

# 2012 COMBINED FEDERAL CAMPAIGN



## DOD CAMPAIGN MANAGER'S GUIDE





Dear 2012 Campaign Managers,

*Welcome to the 2012 Combined Federal Campaign!*

You are an integral member of the DoD CFC team, encountering many opportunities and challenges in the coming campaign. Your passion and commitment to improving the lives of others and your genuine excitement about working with the CFC are factors that will contribute greatly to the success of our work together. You will be the one to whom the Team Captains, Key Workers, and other team members look for guidance and assistance in ensuring a successful campaign.

The *Guide* has been prepared to help you understand and execute your role as a Campaign Manager. You are the single, most critical component in your campaign's success and the information in the *Guide* will help ensure you succeed in attaining your goals. I hope you will refer to this manual often during the campaign; and that you will address any questions to your Loaned Executive for assistance. Both will help you whether you are a first timer or if you have been a Campaign Manager in the past. Things change every year and this *Guide* reflects the most recent information.

Together with the Office of Personnel Management (OPM) CFC website at [www.opm.gov/cfc](http://www.opm.gov/cfc), and the CFC National Capital Area (CFCNCA) website at [www.cfcnca.org](http://www.cfcnca.org), you will have readily available information for every aspect of your campaign.

On behalf of the Department; and the organizations and individuals who will benefit from your efforts, thank you.

Program Director  
Voluntary Campaign Management Office





# TABLE OF CONTENTS

<b>CHAPTER</b>	<b>PAGE</b>
<b>INTRODUCTION</b>	<b>1</b>
<b>Chapter 1 – The Basics</b>	<b>2</b>
• .....	Conceptual Framework
• .....	Legal Framework
• .....	Organization of the CFC
<b>Chapter 2 – Running a Successful Campaign</b>	<b>6</b>
• .....	Assess Your Situation
• .....	Make a Plan
<b>Chapter 3 – Campaign Manager’s Timeline</b>	<b>12</b>
<b>Chapter 4 – Recruiting and Managing Your Team</b>	<b>18</b>
• .....	Deputy Campaign Managers
• .....	Finance Manager
• .....	Logistics Manager
• .....	Events Manager
• .....	Coordinators/Team Captains
• .....	Key Workers
• .....	Event Teams
• .....	Managing the Team
<b>Chapter 5 – Communications and Marketing</b>	<b>22</b>
• Develop a Communications and Marketing Strategy	
• Establish a CFC Website	
• Use Flyers for Special Events	
• Use Broadcast Emails	
• Obtain Charity and Beneficiary Participation	
• Photograph Everything	
• Enter the Communications and Marketing Contest	
<b>Chapter 6 – Campaign Finances</b>	<b>26</b>
• .....	Pledge Forms
• .....	Cash

- ..... Checks
- ..... Electronic Giving
- ..... Confidential  
Pledges/Donations
- ..... Donations of Items
- ..... Track Your Finances

**Chapter 7 – Soliciting Employee Donations 29**

- ..... Solicitation Strategy
- ..... Important Considerations

**Chapter 8 – Awards 32**

- ..... Department/Agency Awards
- ..... Certificates
- ..... Eagle Pins
- ..... Special Categories
- ..... DoD Awards

**APPENDICES**

**Appendix A – Campaign Staff 36**

**Appendix B – Key Events and Dates 38**

**Appendix C – Supplies 39**

- ..... Standard CFC Supplies
- ..... Helpful Hints
- ..... Deliveries to the Pentagon

**Appendix D – Special Events 42**

- ..... Key Functions and  
Responsibilities
- ..... Examples of Special Events

**Appendix E – Charity Outreach 45**

- ..... Guidelines for Charity  
Participation
- ..... Additional Considerations

**Appendix F – Managing Donations 48**

- ..... CFCNCA Geographical  
Area
- ..... Pledges From Outside the  
CFCNCA
- ..... Military Members Not  
Assigned to Their Service

- ..... Direct Payments to Charities
- ..... Communications
- ..... Making Deposits
- ..... Monitoring Open Deposits
- ..... Misrouted Pledge Forms and  
Confidential Pledges
- ..... Reports
- ..... MANAGE
- ..... Ensuring the Accuracy and  
Security of Pledge Forms
  - ..... Key Worker Review of  
Pledge Forms
  - ..... Key Worker Review of  
Pledge Form Carriers
  - ..... Team Captain/Coordinator  
Reviews
  - ..... Completion of Deposit Bag  
and Input to MANAGE
  - ..... Completion of Payroll  
Carrier

**Appendix G – Campaign Tool Box** **58**

- ..... Reasons for Giving to CFC
- ..... Why Payroll Deduction?
- ..... What a Gift Can Buy
- ..... Inspirational Thoughts
- ..... Thanksgiving Message
- ..... CFC Kick Off Agenda
- ..... Kick Off Checklist
- ..... Memo to  
Managers/Supervisors
- ..... Memo to Key  
Workers/Team Captains
- ..... Memo for All Personnel

**Appendix H – 2011 DoD Communications and Marketing Contest Winners** **67**

**Appendix I – Glossary** **68**









## 2012 Combined Federal Campaign

The Combined Federal Campaign (CFC) was established by Presidential Executive Order signed by President John F. Kennedy in 1961. The CFC is the world's largest and most successful annual workplace charity campaign. There are currently more than 200 local and international CFCs.

By providing an expanding range of charities and donation options for Federal employees, the CFC has raised more than \$7 billion since 1964, when the CFC started tracking donor contributions. As one of the most efficient and effective channels for philanthropic giving, the CFC has also given Federal employees an accountable, flexible way to donate to the charities of their choice.

The CFC is constantly looking for ways to improve the campaign and its benefits to those it serves. Currently, there are greater efforts every year to convert giving options away from paper pledges, catalogs, and other documents to user friendly electronic options that save time and money while making more funds available to the charities served by the campaign.

DoD is evaluating additional options to expand its green footprint in campaign activities and giving options. The DoD Voluntary Campaign Management Office (VCMO) is also exploring ways to make more information available online and save the cost of printing and distributing paper campaign items.





## **Chapter 1 – THE BASICS**

Although the CFC has been around for over 50 years, the basic purpose of the campaign has not changed—it is designed to allow Federal employees to help others through a wide assortment of health and welfare charities that operate nationally, internationally, and locally. Some of these charities are household names and others may be less well known as their focus is to reach a particular population in a specific geographic area. Whatever the charity, they must be approved annually by Federal employees to participate in the campaign.

To assist these charities, the CFC has established basic regulations; framework; and operational and organizational norms that apply to the over 200 campaigns. This Guide will focus primarily on the basics of DoD’s CFC National Capital Area (NCA) campaign, but the CFC requirements discussed apply to all CFC campaigns.

### **CONCEPTUAL FRAMEWORK**

The CFC is grounded in several basic concepts. Federal employees:

- Care about the needs of others throughout the world and within their local communities, and the CFC can be the vehicle through which this caring can be turned into action
- Can make a significant difference in the lives of people—even the smallest donation can make a difference in someone’s life
- Choose whether or not to participate in the campaign—it is totally voluntary
- Choose which charities they want to support
- Manage the program, its conduct, and its success

### **LEGAL FRAMEWORK**

The CFC Regulations govern all aspects of the CFC. Executive Orders 12353 and 12404 authorize the Office of Personnel Management (OPM) to prescribe rules and regulations to facilitate fund-raising on behalf of charitable organizations through on-the-job solicitation of Federal employees and military personnel, and to ensure that recipient agencies are responsible in the use of the funds raised. CFC Regulations can be found in Title 5, Part 950 of the Code of Federal Regulations.

## **ORGANIZATION OF THE CFC**

The CFC is a multi-faceted campaign. It is comprised of over 200 campaigns, including the DoD CFC Overseas campaign. The charities served by these campaigns include national, international, and local organizations—some of them members of charity federations and some independent organizations. The CFC and its multiple entities are managed as follows.

### **OFFICE OF COMBINED FEDERAL CAMPAIGN OPERATIONS**

OPM is responsible for the oversight and management of the CFC. The Office of CFC Operations is located at 1900 “E” Street NW, Room 5450, Washington, DC 20415. (202) 606-2564, Fax (202) 606-5056.

### **LOCAL FEDERAL COORDINATING COMMITTEE (LFCC)**

Federal leaders who provide regulatory oversight of the campaign.

### **PRINCIPAL COMBINED FUND ORGANIZATION**

The PCFO administers the local campaign and acts as fiscal agent under the direction and control of the LFCC and the Director, OPM. OPM sets strict requirements for this role. Annual audits of the PCFO are required to be done by an independent Certified Public Accountant. The PCFOs manage the conduct of the local campaign; and screen local charities for eligibility to participate in the CFC. All PCFO activities are subject to approval by the respective LFCC. The PCFO for the CFC in the National Capital Area (CFCNCA) provides training for all Federal agency LEs in the basics of being an LE and facilitates the activities of non-DoD LEs.

PCFOs are contractors. As such, the right to be the PCFO for an area is competed as with any other Government contract. The LFCCs manage the competitive and selection processes for the PCFOs in addition to overseeing the PCFO’s fulfillment of their contract requirements. LFCCs approve all PCFO expenditures before they are reimbursed. PCFOs may be charity federations, managing their own federation in addition to their responsibilities as the PCFO.

### **DoD VOLUNTARY CAMPAIGN MANAGEMENT OFFICE**

The DoD Voluntary Campaign Management Office (VCMO) is responsible for promulgating DoD fundraising policy, providing emergency disaster relief policy, and managing the DoD CFC efforts in the NCA and overseas. During the CFC campaign period, the office facilitates the activities of the DoD LEs.

The VCMO assigns each DoD campaign an LE to assist the Chair, Vice Chair, and CM in running the campaign. The LEs are senior DoD managers and supervisors who have been trained in conducting CFC campaigns, and who work full-time for the CFC during the campaign period. The LE is an essential resource who can help you plan, organize, and conduct your campaign; as well as train your campaign volunteers.

DoD is the largest individual campaign in the NCA, raising over \$17 million in 2011. The DoD organizations in the NCA employ more than 100,000 military and civilian employees. DoD employees in the NCA have contributed more than \$76 million to the CFC over the past 5 years.

## **OTHER ORGANIZATIONAL COMPONENTS**

Within the CFCNCA campaign there are other positions that are designated as part of the campaign in addition to the organizations discussed above. These include the following.

### **CFCNCA Honorary Chair**

The President appoints a Cabinet Level individual to serve as the Honorary Chair of the CFCNCA. This individual is the public leader of the campaign, rallying Federal employees to support the CFC. The duties of the Honorary Chair include:

- Providing visible leadership of the CFCNCA
- Encouraging the President; Cabinet; and all senior civilian and military leadership to have a high profile while the campaign is conducted in their department or agency
- Conducting a model campaign within his or her department
- Signing recognition awards/certificates for use throughout the campaign
- Providing official photos
- Coordinating any media requests for appropriate action

### **DoD Campaign Chair**

The DoD Campaign Chair is traditionally the Secretary of Defense. The DoD Chair promotes the CFC to DoD components and provides top level DoD leadership and commitment to the campaign within DoD locally and overseas.

### **DoD Campaign Vice Chair**

The DoD Campaign Vice Chair is traditionally the Deputy Secretary of Defense. The Vice Chair facilitates and supports the DoD CFC Campaign by conducting the DoD Kick Off and Finale. The Vice Chair may also choose to conduct other activities to recognize and support the efforts of DoD personnel facilitating the campaign.

### **Military Services and DoD Agencies**

Within each of the Services and the DoD Agencies campaign components, there will be a Chair and a Vice Chair appointed, as well as a Campaign Manager (CM). The Chair is traditionally the head of the organization while the Vice Chair will be the head of the organizational component selected to run the campaign within the organization. This can vary depending upon the size of the campaign and the choice of the Chair as to how to individually organize the campaign. Chairs and Vice Chairs are traditionally high ranking military and/or civilian officials. CMs are traditionally senior level personnel.

The Services may also designate a Chair and Vice Chair, as well as an overall CM for the Service in addition to the positions in the components. The Service may or may not have an office dedicated to raising funds or other charitable giving activities.



## **Chapter 2 – RUNNING A SUCCESSFUL CAMPAIGN**

The CM is the primary person who will organize the campaign and implement the program in the agency or component. The CM needs to understand the history, purpose, function, and operation of the CFC and be prepared to provide information to other campaign team members and also to potential donors. The better organized you are, the better the results will be. This section will provide helpful information in the types of things you need to do to help make your campaign a success. Additional details may be found in the following chapters and appendices.

### **ASSESS YOUR SITUATION**

*Meet with your supervisor.* Determine how your supervisor views your involvement in the CFC and the amount of time he/she is willing to let you spend on campaign activities. The Chairs will be briefed by the designated LE on the CM's campaign involvement and will tell the Chair that the position is basically a full time effort during the campaign. However, this may not get effectively communicated to your supervisor. Being able to do the CM job requires supervisory support or you will constantly be torn between those responsibilities and your other duties. Reach agreement with your supervisor on how to handle things. Additionally, if the campaign is getting high level support from the Chair and the Vice Chair the importance of the campaign is easier to communicate to your supervisor.

*Review your agency's organizational structure,* the number and physical location of all office sites, and the distribution of employees by office. Although your agency is required to provide staffing information to the VCMO to assist in the establishment of campaign donation goals, you will need to have a very precise picture of your organization before you organize your team. Your personnel, budget, or finance office can provide you with this data. This is important to help you determine your team structure, goals, and supplies; and track the progress of your campaign.

*Meet with last year's CM.* They can provide helpful historical information and insight into the campaign, its strengths, weaknesses, and any unique issues based on your organization's culture. Obtain last year's lists of campaign team members. This list will give you a starting point on requesting assistance again this year. Obtain information on last year's events and discuss which ones were successful or unsuccessful and why. Determine if there were any legal or ethics challenges that had to be addressed during last year's campaign, and any resolutions to the issues.

*Meet with your LE.* Get their input and insight into running a successful campaign, especially the techniques that work when you are facing the challenges of no cost of living adjustments, potential layoffs, upcoming retirements, etc. Make sure you have all of your LE's contact information so that you can get answers in a timely fashion. Your LE will be an invaluable resource in running your campaign.

*Check with your legal office* to determine who would be the contact for the CFC campaign. Most agencies have an individual who is particularly knowledgeable of CFC laws and other requirements, as well as any other laws, regulations or requirements that could affect your campaign. Also *establish a contact in your ethics office* for any ethics related questions that could surface during the campaign. (Last year's CM may have this information as well to help you get started.)

*Meet with the Chair and Vice Chair* to determine the level of involvement they will commit to the campaign. Try to get as much leadership visibility as possible. People respond when they know the organization's leadership supports the campaign. Tone at the top is critical. Visibility, visibility, visibility is the key to leadership involvement. Invite them to participate in campaign activities; to send a letter of endorsement to all employees, to make videos for your agency website, etc. Be sure to send out a letter/memo/email from the Chair encouraging people to volunteer to be Key Workers or other team members. If the Chair or Vice Chair cannot attend an event, arrange with them to have another high level management official attend in their place. Try to get the Chair and Vice Chair to commit to a back-up plan in their absence.

It is important that upper level management communicate to the supervisors of CFC volunteers that CFC participation is not only approved, but endorsed by the highest levels in the organization. It is very difficult for people to effectively carry out their CFC responsibilities without the support of the highest levels in the organization.

Don't forget to obtain supervisory approval for each team member as well. Be prepared to answer the supervisor's questions as to time away from the volunteer's normal duties, length of time they will be involved in the campaign, and any extra involvement that may be needed for such things as special events.

## **MAKE A PLAN**

*Assemble your core campaign committee* based on the size and complexity of your organization. Larger organization and those with various locations will need to customize the committee to ensure all agency offices and locations are covered. You may choose to have positions such as Finance, Marketing, Logistics, etc. For example, a medium sized organization with two locations may have a committee comprised of a CM and two Deputies or two Coordinators—one for each location. In addition, you may want to have a Finance Manager to oversee the financial aspects of the campaign—collecting monies, making deposits, reconciling deposits in the CFC financial system, etc. This does not include people such as team captains and Key Workers.



This will be your core group that will help hold your hand—and vice-versa—throughout the campaign. These should be people who are good leaders, able to multi-task, and who are committed to ensuring the campaign is a success. This small group will be the heart of your team.

*Determine the overall campaign dates* and any adjustments that may be unique to your organization. By law the campaign runs from September 1 to December 15. It has on occasion been extended by 2 to 4 weeks, but do not count on this. Extending the campaign takes special approval from OPM. It must be well justified and any extension approvals apply only to the campaign that applied. It is not a blanket approval for CFC overall. In addition, you are not required to extend your campaign to the new date. However, you may want to make sure everyone knows they can still accept pledges even if there are no events or active solicitation.

*Plan to start and end the campaign on time.* It will be easier on you and everyone else. People like to have established parameters for planning purposes. For you as the CM, it will be easier to be able to give your supervisor a good date as to when you will be back to your regular job on a full time basis. Supervisors appreciate good dates.

*Plan and schedule important events as soon as possible.* Planning ahead is critical to ensuring the involvement of top level managers and executives in your organization. They usually have their calendars planned weeks in advance. It is also critical to ensure your CFC events do not conflict with other agency events that could decrease the participation for the CFC events. Together with your core group, establish the following events at a minimum:

1. *Chair Brief:* This brief is given by the LE to the Chair. The brief is not a requirement, but is very important in establishing the Chair's commitment to the campaign and is highly recommended even if the Chair is familiar with the campaign. It can be especially important if the campaign did not make its goal in the prior year by enabling the LE to work with you and the Chair to come up with a strategy to achieve better results.
2. *Kick Off:* In DoD, this must occur after the official DoD Kick Off. It should be the kind of event that will inspire people to participate in the campaign. This is your opportunity to make a first impression on your potential donors.
3. *Mid-Campaign Rally:* A Mid-Campaign Rally can help re-energize the campaign, especially if things have slowed down in enthusiasm and donations. Have an inspiring speaker to help fire up the troops.
4. *Awards Ceremony:* This is the final campaign event. It occurs after the DoD Awards ceremony which usually happens in late January. It is important to recognize those who worked hard with public recognition for their efforts. It will also help set the stage for people to be willing to participate in next year's campaign.

You and your core group should also plan for other campaign events such as sporting events, bake sales, auctions, and other activities to keep the campaign visible to agency employees. These can be scheduled at the beginning to ensure adequate time for planning and the designation of the event teams. Be sure to have different teams for different events. Nothing wears out people quicker than overloading them. Think outside the box on the events and do not simply do what “we’ve always done.” New types of events will attract new people, as well as those who may have grown tired of the old events. Based on your meeting with last year’s CM, you should have a good feel for the types of events that worked well and those that did not. Do not hesitate to make the hard calls on events. If an event is not garnering the support or interest you would expect, and you cannot pull it out of the fire, you need to cancel it. A poor event is worse than a cancellation.

In planning all events, do not forget that the main purpose of the CFC is to help those in need—the charities. Include charities whenever possible in your events. The presence of the charities and the opportunity for employees to meet them and obtain information on the charities’ activities will make the campaign real. People will be able to see what their donation can actually do and that their donation can make a difference in someone’s life. You want people to have fun at the events, but you do not want to lose sight of the purpose of the event.

*Establish a CFC website on your agency intranet.* Provide links to CFC information, charity catalogs, calendars, etc. Include testimonial interviews from people who give to the CFC and those who have benefitted from CFC charities. Communicate upcoming events and publicize the events that have already occurred. If you cannot get a dedicate space on you agency home page, try to at least get a visible link to your site.

Post the progress towards the agency goal on a weekly basis. You can post the progress through an animated thermometer or through other visuals. Remember, however, that keeping it visible all the time can lead to people starting to ignore it. Posting it periodically creates a change that people will notice.

*Post a calendar of CFC dates and events online* and send out reminders as events are approaching and the morning of the day they are occurring. Broadcast emails can be effective reminders.

*Determine who will need access to online campaign financial data and who will order supplies.* This access requires that the individual must be trained before they are granted an ID and password to access online data. Make sure the appropriate people are trained by scheduling their training as soon as training dates are posted. At a minimum you will need to ensure you as the CM, the Deputies, and the Finance Manager (if you have one) are trained and their names are submitted for access to financial data.

You must be trained to be approved to order supplies. Order supplies as soon as the online option is available as deliveries are done on a first-come-first-served basis. DoD may be given an early ordering option due to its campaign size and quantities of supplies. Take advantage of the early order option. Determine where your supplies will be stored and how they will be distributed. You will need to identify the delivery location and any clearances that may be needed for the CFC delivery truck to make the delivery. Many DoD loading docks are secure and special permission must be obtained to ensure the delivery can be made. All of this information must be entered on your supply order so you will need to know this before you order.

*Identify your Key Workers:* You will need to assemble a team of volunteers to assist in the solicitation process. These volunteers are referred to as Key Workers for good reason. They are the key to your campaign's success as they are the ones who will be the face of the campaign to the other employees. They will be making personal contact with all of their assigned employees and will be "key" in explaining the purpose and benefits of the CFC. The *10 Best Practices for Campaign Workers* will assist you in identifying Key Worker activities.



Key Workers should be selected for each organizational unit. The general formula is 1 key worker per 15 employees. This will enable each Key Worker to make a personal contact and provide personal assistance to potential donors. Some Key Workers may be able to effectively work with more than 15 people at a time, but it is not recommended. This will be a judgment call on the part of the CM.

Your LE will train your Key Workers prior to your campaign kickoff. Including the Deputies, Coordinators and Team Captains in the Key Worker training will help them understand what is expected of those whose efforts they will be coordinating; and help them to know when something may need their attention and oversight.

*Review your team structure.* Make sure that your CFC team has clearly established responsibilities for each position, that expectations are communicated to each person, and that no one is carrying too much to perform effectively while also performing their regular job. Take "the temperature of your team" frequently to identify any issues or changes that may be needed in the approach, schedule, etc.

It is also important that the people selected for these positions want to participate in the campaign. If they are against the CFC concept or are serving against their will, they will communicate this negativity to those with whom they work or contact. Be sure they understand the value of the CFC and its accomplishments. If this does not convince them they are performing a valuable and worthwhile function, try to find someone else to help you. Keeping someone on the team who does not want to be there will only bring down the team and hurt your effectiveness in achieving results.



## **Chapter 3 – CAMPAIGN MANAGER’S TIMELINE**

The official CFC runs from September 1 through December 15. However, as the CM you will need to be working on your campaign starting as early as July prior to the campaign start and ending as late as March after the end of the campaign. The biggest challenge is knowing as early as possible that you are the appointed CM. Some agencies maintain a CFC dedicated staff while some do not. DoD organizations are notified in advance of the need to submit names to the VCMO for the various CFC positions, but are sometimes late in identifying the CMs. You will need to work with your notification situation as well as you can and lean on your LE for additional help. The timeline below is suggested. It may or may not work for your agency so feel free to tailor it to meet your requirements while observing the pre-scheduled campaign events. Consult your prior year’s CMs for additional assistance. There should also be a record of the prior year’s campaign put together by the prior CM. This may be available as a hard copy record or may be electronic. Every campaign should have a record book of how the campaign was conducted.

## *JULY*

*Meet with your supervisor to discuss CFC  
duties*

*Contact prior year's CM to discuss prior  
year's campaign*

*Obtain prior year's records*

*Review agency structure to determine  
campaign's organization*

*Meet with ethics and legal staff for guidance*

*Assemble core campaign team*

*Assign basic duties to core team*

*Identify Coordinators, Team Captains*

Keep in mind that August is going to be a busy month and the planning and activities you do prior to the start of the campaign will determine how well your campaign is run.

## *AUGUST*

*Finalize campaign and event dates*  
*Plan Kick Off and get commitments from Chair, Vice*  
*Chair, speakers, and charity attendees*  
*Identify Coordinators and Team Captains*  
*Identify Key Workers*  
*Meet with LE to review campaign strategy and establish*  
*dates for LE to do the Chair Brief and train the Key*  
*Workers*  
*Confirm dates for Chair Brief, Kick Off, Mid-Campaign*  
*Rally, and Awards Ceremony*  
*Schedule classrooms for Key Worker training*  
*Schedule facilities for events*  
*Identify payroll offices for military and civilian*  
*personnel*  
*Determine who will enter financial and other data into*  
*CFC online system*  
*Schedule training for all who will need access to the*  
*online financial and supply ordering system*  
*Develop a logistics plan*  
*Order supplies*  
*Set up intranet site*  
*Develop marketing products*  
*Update the campaign record*  
*Attend Operations Meeting*

September 1 is the official start date for the CFC. However, in DoD the campaign does not officially start until the DoD Kick Off. This usually occurs in mid September. All DoD organizations will receive their official goals at this ceremony, although goals are generally determined and notifications of goals are given out at the Operations Meeting.

***SEPTEMBER***

*Attend NCA Leadership Conference*

*Attend DoD Kick Off together with Chair and Vice Chair*

*Conduct organizational Kick Off together with Chair and Vice Chair*

*Conduct Key Worker Trainings*

*Distribute campaign supplies*

*Request Eagle pins from LE*

*Identify deposit drop point(s)*

*Verify that Key Workers have distributed campaign materials to their assigned employees*

*Ensure deposits are made weekly*

*Ensure payroll forms are turned in weekly*

*Update intranet site every week*

*Update campaign record book*

Organizational Kick Offs occur after the DoD Kick Off ceremony.



The campaign should be well underway in October. This is a good month to be very active in contacting potential donors and conducting high visibility events. This month's activities are key in your progress towards goal. The campaign is fresh and so are your campaign team members.



*OCTOBER*

*Conduct campaign events*

*Collect pledges at least weekly, verify, enter into financial tracking system, make deposits, and turn in payroll forms*

*Update intranet site*

*Update campaign record book*

November is the point at which you should have a good reading on how your campaign is going and whether you need to kick it up a notch to make goal by mid December. Keep in mind that the end of November starts the holiday season and the focus of potential donors usually switches to the holidays and all of the activities and expenses involved. Additionally, keeping the campaign fresh becomes a challenge after mid November. The campaign has not lost its value; however, the focus of your donors, and in some cases your campaign team members may shift.

## **NOVEMBER**

*Plan Awards Ceremony, schedule speakers,  
confirm facility, etc.*  
*Verify that Key Workers have followed up with  
employees who have not responded*  
*Conduct campaign events*  
*Collect pledges at least weekly, verify, enter  
into financial tracking system, make deposits,  
and turn in payroll forms*  
*Update intranet site*  
*Update campaign record book*

December is the home stretch for your campaign. The official campaign end date is December 15. If you have not made goal, you may need to quickly adjust your strategy. Some CMs hold special, high visibility events the first week in December as the home stretch effort to make or exceed goal. Talk to the prior year's CM to get some ideas of what worked well in your organization during this month. Also talk to your LE and your Chair if you need their assistance for the final push.

## **DECEMBER**

*Prepare and submit Communications and  
Marketing Contest entries*  
*Order organizational awards*  
*Prepare award certificates for campaign  
team members*  
*Conduct campaign events*  
*Collect pledges at least weekly, verify, enter  
into financial tracking system, make  
deposits, and turn in payroll forms*  
*Update intranet site*  
*Update campaign record book*

## **Chapter 4 - RECRUITING AND MANAGING YOUR TEAM**

Once you determine the best team structure for your campaign, you will need to determine how to recruit for those positions. Regardless of the position, you will need people who have leadership capabilities, are organized, are good time managers, and who believe the CFC provides a value to donors and the charities served. Attitude is paramount. No amount of talent or knowledge makes up for a negative attitude. The best choices are often the people who have been participating in the campaign for a number of years, or who were participants in a particularly successful campaign. They understand the amount of work it takes, they are willing to do it, and they understand the value of helping others.

When you have identified your organizational framework and the best combination of team positions to manage the campaign, you are ready to recruit your core team and then your Key Workers. It is not necessary to have every position described in this chapter. Customize your positions to meet your needs.

Whatever your decisions on the campaign team organization, be sure that there is a back-up for every position in the event someone is on leave, sick, working a compressed schedule, etc. That includes you as well. Be sure your deputy(ies) cover for you if you should be away so that the campaign doesn't skip a beat. And be sure to communicate back-up arrangements not only to the rest of the team, but also to management. Questions about the campaign can arise from any level.

### **DEPUTY CAMPAIGN MANAGERS**

If you have an organization large enough to have one or more Deputy Campaign Managers, recruit individuals who clearly have leadership abilities, are positive and respected by their associates, are well organized, can effectively multi-task, and who can be you in your absence. Find people who are team oriented and understand the need to fill in for you and others when needed. Do not select people who are inflexible and unwilling to go the extra mile when needed. Deputies may interface with the Coordinators and Key Workers more than you depending upon your team organization. They should be good communicators, both up and down the organization's chain of command.

## **FINANCE MANAGER**

Having someone oversee the financial aspects of the campaign, manage the deposits, make the financial entries into the CFC accounting system, and provide guidance to event coordinators and others on how to manage and report donations can relieve the stress of managing this aspect of the campaign. Recruit someone who understands how funds are accounted for in general and how CFC funds are accounted for in particular. Ensure they have appropriate lock-up facilities for Pledge Forms and cash until they can be processed. It is very helpful if they have a private office, but not an absolute necessity if adequate lock-up space is available.

## **LOGISTICS MANAGER**

The Logistics Manager can assist the team in ensuring adequate supplies are ordered on time, deliveries are coordinated with the loading dock, supply storage is arranged, and other logistical aspects of the campaign are accomplished—i.e. meeting rooms. The Logistics Manager should be familiar with the building operational requirements and the organizations managing the building. They should also be able to manage the supply ordering, receipt, and distribution process.

## **EVENTS MANAGER**

For larger campaigns it can be very helpful to have an Events Manager to oversee the various events and ensure they are run according to agency and CFC requirements. The Events Manager working with the Logistics Manager can establish all of the necessary venues for the various events—meeting rooms, charity attendance, parking for guests, etc. The Events Manager will need to be supplemented by Event Teams for each event.

## **COORDINATORS/TEAM CAPTAINS**

You may or may not have both types of positions depending upon how you organize your campaign. Coordinators generally oversee an organizational segment and coordinate the efforts of Team Captains and Key Workers within that segment. Team Captains generally oversee a group of Key Workers. These positions require organizational and people skills, as well as management skills as they will be receiving donations, Pledge Forms, etc., for processing. They will need to have knowledge of the campaign and how it is organized, as well as the skills to determine that Pledge Forms and monies are properly handled and turned in to the proper people/locations for processing. They also oversee the solicitation activities of others and should be able to identify any performance issues in carrying out campaign responsibilities. They need to actively interface with those they are overseeing on a regular basis.

## **KEY WORKERS**

Key Workers are key to the success or failure of the campaign. They are the face of the campaign to donors. Recruiting quality Key Workers, training them, and managing them is probably the single aspect of the campaign that has the greatest payoff. This can be seen in the statistics related to the source of campaign donations. Generally, the split of donations sources is 95 percent from payroll deductions and electronic giving, and 5 percent from events. Electronic donations are becoming a larger percentage each year and are expected to increase even further.

Key Workers are the source of information for donors in relation to payroll deductions and electronic donations. They explain the campaign to potential donors and provide the necessary information and forms with which to make their donations. Therefore, they should be friendly and personable when dealing with others. They should also be attentive to detail as they will be the first line of review in evaluating Pledge Forms. Events are wonderful to keep the campaign in front of potential donors, but the major source of donations is still payroll deduction.

To be effective, a Key Worker should have only limited numbers of employees to contact. A good rule of thumb is 1 Key Worker per 15 employees. Key Workers are trained by the LE in a formal training setting. During the training they receive their Key Worker kits and sufficient information with which to carry out their responsibilities. They are also trained in how to handle PII information and other security measures for protecting CFC information.

Other considerations in selecting and managing Key Workers are:

- Supervisors cannot be Key Workers in their own organization as this would give the appearance that supervisors might influence subordinates to donate
- Key Workers cannot coerce people into giving. They can only present the materials, discuss the purpose of the CFC, and answer questions
- Records of who did and did not give cannot be kept
- Key Workers have to personally contact everyone they are assigned and provide donation information

Recruit employees of your agency who are personable and respected. The support of their supervisor/management is crucial to their being able to do their job. Consider having the Chair or Vice Chair send out a memo soliciting Key Worker volunteers. Screen the volunteers to be sure they demonstrate the qualities you need for the position because this position is so important to the success of your campaign.

## EVENT TEAMS

Identify teams for the various CFC events as soon as possible so they have time to plan the events, arrange space, etc. One approach is to have individual sign-up sheets for the various CFC events/activities at Key Worker trainings. You can ask each of the Key Workers to sign up for one event either as the event chair or as an assistant. This will get them more involved in the campaign and will help you schedule and run events as well. Another approach would be to check with the teams that ran similar events last year to determine if they would be willing to help this year.

## MANAGING THE TEAM

To get maximum results, the CM has to closely manage all aspects of the campaign directly or through delegation. Clearly defined and agreed to responsibilities coupled with good communication will resolve a lot of issues before they occur. While the CM has the overall responsibility for the campaign, effective delegation can ensure everything gets done and everyone has a good experience.

Have weekly (at a minimum) meetings with your core team. Identify issues they are experiencing and identify action needed to make corrections. You cannot afford to wait weeks to try to resolve a problem, the campaign will be over and you may not meet your goal. Issues



must be dealt with quickly and the campaign kept on track to be successful. If the issues require top level management resolution, make sure you bring it to their attention immediately. Do the same for issues involving ethics and legal issues. If there are personnel issues or complaints made by donors, deal with them immediately.



Track performance by unit when possible. This will enable you to pinpoint problems and identify solutions before it is too late to make corrective adjustments. It will also enable you to identify the successful units and use their experience and mode of operation in other units.

Have *all* team members attend Key Worker training. The fact that someone has attended Key Worker training in the past does not substitute for attending the training. Each year, the campaign has new processes and procedures. Without this training, the team will not be able to perform as effectively as possible—the solicitation of donations is the whole purpose of the campaign. It's also important to renew their initiative and motivate them for the new campaign. The *2012 10 Best Practices for Campaign Workers* and the *2012 10 Best Practices for Campaign Workers (Agencies with Paperless Payroll)* are available online at [www.CFCNCA.org](http://www.CFCNCA.org). These publications contain guidance on conducting campaign activities.

## Chapter 5 – COMMUNICATIONS AND MARKETING

A well communicated campaign will be a successful campaign. Communication is the primary way to get the campaign before potential donors and to ensure they have all of the information they need to make an informed decision. Communication is the “voice” of your campaign. The more organized and visible your efforts, the more potential donors will be comfortable in making a giving decision. Develop a communications strategy that uses all of your agency’s available media resources. You will need to continually focus employees’ attention on the benefits of the CFC. Your communications will inform them of the importance of the campaign, its time frame, campaign events, and information resources.

Customize your strategy to fit your needs and reach your employees as effectively as possible. Your strategy is not limited to the suggestions below. Keep in mind the Communications and Marketing Contest in December, so remember to document your activities and take lots of pictures.

### DEVELOP A MARKETING STRATEGY

*Use the official 2012 CFCNCA style guide theme and logos and apply them to your own campaign’s promotional materials. The 2012 CFCNCA style guide is available online at [www.CFCNCA.org](http://www.CFCNCA.org). Your organizational theme can reflect the mission of the organization and how it supports the CFC purposes. Involve your graphics department in developing communication and marketing materials. Make the theme and logos consistent in all materials to develop your own campaign “brand.”*

*Determine the types and quantities of posters, flyers, and other displays your organization will want to produce in addition to the CFC materials available on the CFCNCA website. Also, consider the strategic locations for placing these materials, and determine if any approval is required before they can be posted. (Some agencies have limitations based on building management requirements in locations for posters and other promotional materials.)*

*Use special events as a means to raise awareness of the CFC—visibility, visibility, visibility—and to make the campaign fun. Events can include charity fairs, ice cream socials, community service days, silent auctions, in addition to the primary events—kick off, awards, etc.. You will need an event coordinator and helpers for each event. If people have run particularly successful events in the past, determine whether they would be willing to coordinate it again this year or if they would at least advise the appointed coordinator on conducting the event.*

## **ESTABLISH A CFC WEBSITE**

Use the intranet to publicize the campaign. Develop a local CFC website/home page and post your campaign activities. Publicize all events on the site as well as the progress towards the campaign's goal. If possible, include testimonies related to the CFC charities from employees and senior staff. Post pictures of past events showing how much fun people had participating. Visit the OPM CFC website at [www.opm.gov/cfc](http://www.opm.gov/cfc) and the CFCNCA website at [www.CFCNCA.org](http://www.CFCNCA.org) for ideas and information.

## **USE FLYERS FOR SPECIAL EVENTS**

Bright, colorful flyers will gain the attention of employees. Have them prepared so they look professional and contain all of the necessary information including who to contact to make donations, what time the donations need to be in place, where the event is occurring, etc. The flyer should answer all the questions needed for someone to attend and/or participate in making the event a success.

Appoint someone to review *all* flyers prior to printing and posting to ensure they meet all agency and CFC requirements for flyers and other posted materials. If something is questionable, check with the appropriate authority within your agency.

See Appendix D for additional information on special events.

## **USE BROADCAST EMAILS**

These are very effective to remind people of events that are upcoming and imminent. Be sure to include all relevant information in the email. If you find an event is underway, but attendance is low, a broadcast email can "remind" folks that it is happening now.

Some agencies do not allow broadcast emails for these types of purposes. Be sure your organization does allow CFC broadcast emails before you implement this strategy.

## **OBTAIN CHARITY AND BENEFICIARY PARTICIPATION**

Charity participation in events is one of the most effective communication tools you can use. The whole purpose of the CFC is to support the participating charities and their beneficiaries. Involve as many as you can in your events. This will bring the reality of the services provided before the employees. They will be able to "see" what the charities do and how people benefit from the CFC donations. The charities can bring them face to face with the reality of the need. Many donation decisions are made based on personal contact with a particular charity at an event.

Be careful that you select a range of types of charities so that it does not appear you are promoting any particular charities. Charities may be selected and requested through the CFCNCA website. You will be notified of which charities have accepted your invitation and the contact person for the charity. You can then talk to the charity representative to arrange times, access to your facility, etc. Each agency has different security requirements to gain access to the facility. Check out what you need to do ahead of time so that you can facilitate the charity's entrance, exit, and parking.



Invite charity representatives and beneficiaries of the charities' services to speak at various events. Most charities have presentations they can give to help potential donors to understand what they do and how their services benefit others. It is good to arrange a variety of speakers to help communicate to potential donors the wide range of services they can choose for their donation.

See Appendix E for additional guidelines on Charity Outreach efforts.

## **PHOTOGRAPH EVERYTHING**

Chronicle the history of your campaign and events by taking photos and publishing them on your website/home page and on the agency home page whenever possible. These photos can also be used for your entries in the Communications and Marketing Contest in December. Photos are the basis for not only the Best Photography competition, but also documenting the Best Special Event and other entries.

Photograph quality is essential to good documentation. Arrange to have your agency provide a professional photographer whenever possible—especially at the primary events. This will ensure you have a good record of your campaign, good input for your intranet presence, and good entries for the Communications and Marketing Contest. Don't depend on someone's personal point and click unless that's your only alternative.

And don't forget that because your organization is under DoD, everyone must remove their CAC cards when photos are being taken. You may want to post a placard at the entrance to the event when photos will be taken.

## **ENTER THE COMMUNICATIONS AND MARKETING CONTEST**

The Contest rewards your creative efforts in communicating the CFC message and demonstrating how your efforts helped accomplish the CFC goals. The DoD Communications and Marketing Contest consider only DoD entries. The categories include:

- Best Special Event
- Best Overall Communications Program
- Best Campaign Writing or Publication
- Best Poster/Display
- Best Website or Electronic Communications
- Best Photography and Use of Images

Each of the categories is divided into small, medium, and large agencies. The entries are judged by representatives of CFC charities. Prizes are awarded for First and Second Place in each category and each agency size. Winners receive an award certificate to be posted in their home agency. The First Place DoD winners are then forwarded to CFCNCA and entered in the overall CFCNCA Contest. DoD has consistently provided excellent, competitive entries in the CFCNCA contest and has won numerous awards. Therefore, your entry could not only win a DoD award but also a CFCNCA award.

The entries are judged based on several factors. They should reflect the overall CFC goals:

- Make 100 percent contact with employees in the agency,
- Increase employee participation, and
- Increase the average gift amount.

In addition, they will also be judged based on:

- Overall Impression
- Presentation Quality
- Creativity/Uniqueness, Communicating CFC Message, and
- Perceived Level of Effort

For details on the contest categories, entry criteria, and an entry form, visit [www.cfcnca.org](http://www.cfcnca.org) or talk to your LE or VCMO staff member. Every time you use some form of media to advertise the campaign, you are developing a potential entry.

 50<sup>th</sup> Anniversary  
 Combined Federal Campaign National Capital Area  
 Department of Defense  
 2011 Award for Communications and Marketing

**FIRST PLACE**  
*BEST CAMPAIGN WRITING OR PUBLICATION*



**Barbara Edmondson**  
 Department of the Army  
 Joint Base Myer-Henderson Hall



*Louis B. Torchia*  
 Louis B. Torchia, Director  
 Voluntary Campaign Management Office  
 Department of Defense

The 2011 contest winners are listed in Appendix H.



## **Chapter 6 - CAMPAIGN FINANCES**

Proper management of campaign finances is crucial for the CM. There are a number of facets to finances that could result in embarrassment if not carefully monitored. You will be receiving donations towards your campaign in the form of payroll pledge forms, cash, checks, and electronic giving. With the exception of electronic giving, you will have the oversight responsibility for ensuring all of these donation streams are properly managed. You may also receive donations of items to your campaign that can affect the donor's finances. Therefore, it is covered in this chapter.

You will need to have adequate internal controls over financial donation streams to ensure the data is protected—some contain Personally Identifiable Information or PII—some are easily pilfered—cash—and some are easily misplaced—checks. If you have a Finance Manager, choose an individual who understands the importance of controlling the donation streams and who is able to determine if there are problems in any of the streams. It is also a good internal control to have two people do things such as count the cash and verify the deposits. One may see something the other may miss, and verification of amounts is a good practice.

Additional information on functions affecting financial management is included in Appendix F – Managing Donations.

### **PLEDGE FORMS**

Pledge forms are distributed to employees by the Key Workers. (See Appendix \_\_ for details on how the Key Workers carry out these functions.) When an employee decides to make a payroll deduction donation, he/she fills out the form with all applicable information and returns it to the Key Worker.

The Key Worker will verify certain information on the 3-part form, provide the donor copy to the donor, and turn in the other two parts of the form to their Team Captain or Coordinator (depending on your campaign organizational structure). The pledge forms are split into the deposit forms and the payroll forms, batched, and put into the proper type of envelope. This will be detailed in Key Worker training. The deposit envelopes are then deposited by the Team Captain/Coordinator or the individual(s) you have designated for making the deposits. The payroll forms envelope is to be turned in to the payroll office. At a minimum, all pledge forms should be turned in on a weekly basis.

These forms must be carefully protected from the time they are turned into the Key Worker until the time the deposit or payroll envelope is turned in to the depository or the payroll office. The forms contain PII. Key Workers and others who handle these forms must keep them secure as required by PII regulations. The deposit envelopes may also contain cash and checks. Transportation of these forms should be kept to a minimum for the sake of security; and if it is necessary to transport them, proper precautions should be taken to protect them at all times. In 2011, CFCNCA increased the number of depository locations to accommodate the widely scattered Government organizations in the NCA and minimize the travel needed to get the deposit envelopes to the depositories. The CFCNCA's website identifies all of the approved deposit locations. You must deposit your envelopes in one of the approved locations.

## **CASH**

Cash always presents challenges in ensuring it is handled properly and protected from pilferage. Many campaigns establish a safe in the CM or Finance Manager's office to hold receipts from events and other sources until they are deposited. In DoD this can be an issue as the CFC receipts cannot be housed in the same safe with classified materials. If a safe is not available, ensure that the receipts are locked up in a desk or file drawer at a minimum.

Control over cash can be enhanced by having two people verify the event receipts and other cash donations. If you have any questions regarding internal controls over your cash donations, contact your LE for suggestions.

## **CHECKS**

Donors may elect to make one-time donations to the CFC by check. This can be done at events or as a result of the Key Workers distribution of pledge forms. Checks for which the donor wants to designate a particular charity(ies) must be accompanied by a pledge form noting the charity(ies) whether it is given at an event or as the individual's 2012 donation. Checks given at events that do not have a designated charity will be treated as cash and included in the event deposit without an attached form. Checks given as the individual's 2012 CFC donation should have a form attached to the check even if it is undesignated. The forms also provide the donor a receipt for their donation if they want something besides their cancelled check as a receipt.

Experience with checks has shown that the biggest problems are keeping them attached to the pledge forms and ensuring they are properly designated in the deposit envelope. Accounting for them on the deposit envelope will be determined by the purpose of the check—event donation or 2012 CFC donation. Details on how this is done are included in the Key Worker training.

## **ELECTRONIC GIVING**

Electronic giving is the easiest on you and your teams as you are not involved in the process. Employees go online to the CFCNCA web site and make donations through credit or debit cards and electronic checks. You will not know when this happens, who did it, or individually how much was donated. The electronic giving will show up in your CFC online account as a larger total than the total you are tracking through your deposit envelopes.

In 2012, the Defense Finance and Accounting Service (DFAS) is planning to do a pilot program which will allow selected DoD employees to make their payroll pledges electronically as is done in some other Federal organizations. The status and details of this process will be made available during CM and Key Worker trainings.



## **CONFIDENTIAL PLEDGES**

Another source of donations that you will not be able to track directly is confidential pledges. Donors have the right to give a confidential pledge—one that you will not be able to account for as it is submitted in a sealed envelope to the Key Worker. These donations are included in the deposit envelope and are opened and accounted for when they are audited.

## **DONATIONS OF ITEMS**

You may have events for which employees donate items and want a receipt for their donations for tax purposes. This can be a sticky situation for you as CM. As a general rule, you can provide a receipt to people noting what was donated. However, you should not sign the receipt as a representative of your agency or the CFC. You should not establish any values for the items donated on the receipt. It is up to the person donating the item to do the necessary support documentation required by the IRS to identify the donation as a tax deduction. Be very careful to not interject yourself, or any of the campaign volunteers, into any situation between the employee/donor and the IRS. Also check with your legal office to ensure they are onboard with your providing a receipt.

## **TRACK YOUR FINANCES**

The CFCNCA website has financial tracking information for each campaign. Be sure to check your reports no less than weekly to ensure all of your deposits have been made and are included in the tracking reports, identify any issues with delayed processing of your deposits, and to determine when awards may have been earned. The online reports can provide you campaign financial data for several years back for your overall organization as well as any components that have been tracked individually. This reporting system will help you pinpoint past donation issues—one component has consistently missed its goal—and help you determine where to provide additional effort or other assistance. It will show you your current year's progress towards goal as compared to how it has progress in past campaigns and many other useful pieces of information. You will receive training in the use of this system prior to being allowed access.

It cannot be over emphasized how important it is for you to track the financials related to your campaign. You will receive training as to how to access the system, how to customize the reports for your needs, and how to recognize red flags that need your attention. It is very important that you and your Finance Manager (if applicable) track this frequently. A fast moving campaign changes every day. The entire campaign is over in a matter of weeks. Do not get caught by something unexpected because you were not checking your reports.





## Chapter 7 - SOLICITING EMPLOYEE DONATIONS

How you solicit employee donations is governed by specific requirements in CFC regulations and other implementing instructions and memos. There are key rules involved:

- Employees cannot be coerced or pressured into giving
- Employees can choose the charities which will receive their donations
- Employees determine the amount of their donations
- An organization cannot require 100 percent participation
- No records of who did and did not donate may be kept
- No completed pledge forms can be kept by the Key Workers longer than necessary to properly process the forms

### SOLICITATION STRATEGY

Your goal should be 100 percent contact of employees to afford everyone the opportunity to give. Each employee should be *personally* contacted—do not leave pledge forms and CFC information on their desk, in their in-boxes, etc. If they are not at their desk, wait until they are available and then contact them. If you are in a situation in which an employee will be on extended TDY or absent for some other reason for a long time, exercise judgment in how the contact should be made.

The employee decides whether or not to give. If the employee says they are not interested in participating, the Key Worker should thank them and move on. No pressure should be applied to get the employee to reconsider. If the employee changes his/her mind later and decides to participate, it is up to the employee to contact the Key Worker.

Key Workers who are lower graded/ranked than the employees they are assigned to contact may feel intimidated when soliciting the higher-graded employees; or, conversely, may feel pressure if solicited by higher-graded employees. If these situations become an issue, you or one of your campaign team leaders may need to step in and assist the Key Worker.

In the situation of a higher graded/ranked employee soliciting lower graded/ranked employees, it is important to keep in mind that supervisors cannot solicit those whom they supervise. This type of situation could lead to claims of coercion. You will need to have someone from another unit contact the supervisor's group.

Group solicitation may be appropriate in some situations. In a group solicitation, the Key Worker or LE provides a CFC presentation informing the group of the basics of the campaign, tracks the assigned employees' attendance at the meeting, and then follows up with the attendees to collect Pledge Forms. For those who are absent from the group meetings, the Key Worker should make personal contacts. The preferred method is one-on-one contact as it is the most effective in making the campaign personal.

## **IMPORTANT CONSIDERATIONS**

Your campaign's success rests on how well the Key Workers do their job. If Key Workers merely place the Pledge Form and CFC information in employees' in-boxes, on their desks or chairs, or solicit contributions by e-mail, they are seriously limiting the maximum potential for a successful campaign. Committed Key Workers personally invite each employee, one-on-one, to make a decision about contributing to CFC.

Voluntary giving is fundamental to Federal fund raising activities. Actions that do not allow free choices and/or create the appearance that employees do not have a free, confidential choice to give are contrary to Federal fund raising policy. Some activities are contrary to this guidance. They include but are not limited to:

- Soliciting employees through a supervisor or any individual in their supervisory chain of command
- Asking whether an employee chose to participate or not to participate, or the amount of an employee's donation, especially by a supervisor. Supervisors may only be given a summary of the statistics for the units that they supervise
- Establishing personal dollar goals and quotas
- Developing or publishing lists of contributors or non-contributors
- Using employee lists for purposes other than the routine solicitation and collection of pledges; and
- Using the results of the CFC solicitation as a factor in the supervisor's performance appraisal

Key Workers, Team Captains, or Coordinators will need to collect Pledge Forms at least once a week, review them for accuracy and completeness, and submit them to the individual designated to receive the deposit and payroll envelopes. (See Appendix F for additional information.) It is important to monitor the solicitation activities during the campaign to ensure Key Workers are distributing and collecting the pledge forms as required. If you or one of your campaign team's leaders notes that Pledge Forms are missing from particular components or Key Workers, designate someone to follow-up to determine why this may be happening. Sometimes Key Workers are on leave, are sick, or on TDY. They should have appointed someone to act in their absence, but because of circumstances this did not happen. Sometimes it may be that the Key Worker has not made the distribution for other reasons. Assess the situation, and if warranted you may need to appoint a new Key Worker for the unit.



Emphasize to Key Workers and to others in the campaign the importance of the words “Thank You.” These words go a long way in encouraging people to participate.





## Chapter 8 - AWARDS

The CFC provides awards to recognize organizational and individual contributions to the CFC campaign. Each award has its own criteria as indicated below. Both you and your Finance Manager (if applicable) should be aware of the various categories of awards and the criteria for each award in order to determine when an award has been earned. Your component will be responsible for ordering some of the awards through the online campaign management system, while some will be ordered by the VCMO.

### DEPARTMENT/AGENCY AWARDS

The awards and their criteria are:

**President's Award.** This award is given to reporting units achieving 75-percent employee participation or \$275 per capita gift.<sup>1</sup>

**Chairman's Award.** This award is given to reporting units achieving 67-percent employee participation or \$225 per capita gift.

**Honor Award.** This award is given to reporting units achieving 60-percent employee participation or \$175 per capita gift.

**Merit Award.** This award is given to reporting units achieving 50-percent employee participation or \$125 per capita gift.

**Million Dollar Circle Award.** This award is given to component units of departments and agencies that raise more than \$1 million in contributions.

**Participation Achievement Award.** This award is given to departments and independent agencies that achieve a 2-percent increase in the participation rate over the 2011 campaign. (No certificate accompanies this award.)

Each assigned department or independent agency that meets the following criteria will earn one of the following awards:

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<sup>1</sup> Per capita gift: total amount of contributions divided by the total number of employees per agency. This should not be confused with the average gift per donor.

**Summit Award.** This award is given to departments and independent agencies achieving a 3-percent increase in giving over the 2011 campaign.

Awards are based on the official CFC records of contributions received by CFCNCA. This is known as the “Audited Report.” Awards cannot be made based on estimates or projections of contributions.

It is best for CMs or their designees to order all plaques and certificates at the same time rather than at several different times. Agencies must order awards via the online CFC system. No awards will be distributed without being entered in that system. Once you place the order, it will be reviewed and approved by your LE prior to going to processing. If you are unable to order awards online, contact the VCMO or your LE for help placing your order. Please allow 10 working days for preparation and delivery of plaques to CFCNCA.

CMs, or their designees, can order online the President’s, Chairman’s, Honor, and Merit Awards for qualified reporting units at the end of their campaigns. For those unable to order awards online, contact your LE or a VCMO staff member for help in placing your order. The Million Dollar Circle, Participation Achievement, Campaign Leadership, and Summit Awards are ordered by the VCMO.

The VCMO reviews all agency accounts to determine the awards for which they have qualified. However, each agency must notify the VCMO of the name of the component to be engraved on any award plaques. Please double check the spelling and lettering for each requested plaque. *Although the VCMO will review all orders, it is up to you to ensure the accuracy of the citation.*

**NOTE:** *Awards can be ordered for free until March 30, 2013. After that date, any agency requesting an award will incur the cost of the plaque and the engraving.*

## **CERTIFICATES**

Certificates are available upon request to recognize individuals responsible for campaign success. Certificates can be issued with the name of the CFC Honorary Chair or left blank for your own department or agency head to sign. These can be obtained from your LE or the VCMO.

**Most Valuable Fundraiser.** This certificate is for CFC Vice Chairs, CMs, Coordinators, and other members of your CFC team.

**Special Service.** This certificate is for volunteers who have provided outstanding service to the campaign.

**Appreciation.** This certificate is for each Key Worker.

**Outstanding Payroll Deduction Giving.** This certificate is for attaining an exemplary level of support for the CFC with 75 percent or more of contributors making payroll deduction gifts.

**100 Percent of Goal.** This certificate is for any reporting unit meeting or exceeding its campaign goal.

CFC certificates for volunteers can be issued with the name of the CFC Cabinet Chairperson appointed by the President, or they may be left blank for a senior manager from your own agency to sign or autopen. Please advise your LE or VCMO of the number and type of certificates needed and whether they are to be signed or unsigned. Depending upon time available, your LE may be able to assist you in preparing these certificates. Your LE will also be able to e-mail a template of the certificates so that you can print them as needed.

## **EAGLE PINS**

The CFC recognizes contributors who give 1 percent of their salary as Eagle givers and 2 percent of their salary as Double Eagle givers. Donors annotate their qualification on the pledge form by checking the appropriate box. They will receive a single or double eagle lapel pin from their Key Worker.

It is not necessary for Key Workers to verify whether the donor actually gave the percentage required. Key Workers are to take the word of the donor that they do in fact qualify. For example, a donor may have donated through means other than the pledge form and the total of their donations would qualify them for a pin. They would know this, but the Key Worker would not.

Individual campaigns obtain the eagle pins from their LE. Generally, the CM can request the same number of eagle and double eagles as were given out in the prior year's campaign; and then supplement if needed.

## **SPECIAL CATEGORIES**

There are several categories of special awards that are also given to individuals who have made particularly significant contributions to the CFCNCA campaign.

**CFCNCA Hero/Heroine:** Each Cabinet-level department, branch, and independent agency will have the option of nominating a CFCNCA Hero or Heroine for a special award at the Campaign Celebration. The person should be nominated based upon two key factors: CFCNCA volunteer activities and community-wide volunteer activities.

**Most Innovative Campaign Technique:** will go to the department/agency or reporting unit that develops the best creative campaign technique.

The CFCNCA Hero award recipient and the winner of the Most Innovative Campaign Technique Award will be entered into the national CFC contest sponsored by OPM.

Entries for these two categories must be submitted to the VCMO, not to CFCNCA. The VCMO will forward entries to CFCNCA. Check with your LE or online at [www.CFCNCA.org](http://www.CFCNCA.org) for the date award nominations are due to CFCNCA. Presentation of awards to the winners will be made at the final 2013 CFCNCA Community-wide Celebration. Contest guidelines, applications for entries, and details about judging will be available online at [www.cfcnca.org](http://www.cfcnca.org) or through your LE.

## **DoD AWARDS**

DoD also provides special awards to its campaign participants. These include:

**David O. Cooke CFC Loaned Executive Leadership Award** is awarded for outstanding leadership by a LE. The award is named in honor of Mr. Cooke's enduring CFC leadership and support.

**John Moreland Award for CFC Operational Excellence** is awarded for outstanding operational excellence by a LE. The award is named in honor of John Moreland who served for 18 years as a DoD LE.

**The McCarter and Richardson Outstanding Campaign Manager Award** is awarded in honor of Sara McCarter, a CFC CM for 18 years; and Sheron Richardson, a CFC CM for 15 years. This award is presented to small, medium, and large campaign CMs. The award goes to the accounts best exemplifying excellence in support of the CFCNCA.





## **Appendix A - 2012 CAMPAIGN STAFF**

### **Honorary Chair**

John Berry

Director of the Office of Personnel Management

### **DoD Chair**

Leon E. Panetta

Secretary of Defense

### **DoD Vice Chair**

Ashton B. Carter

Deputy Secretary of Defense

### **Combined Federal Campaign, National Capital Area**

Acting Executive Director

James Francavilla

### **DoD VCMO (CFC) Staff**

Director

Vacant

Acting Director

Chrisenda William Jones

Program Specialist /

Loaned Executive

Coordinator

Michael Kelly

Program Manager

Stephanie Pettway

Logistics Manager

Terry Tharp

VCMO Address

1550 Crystal Drive

Arlington, VA 22202

VCMO Mailing Address:

WHS/HRD-VCMO

1550 Crystal Drive

Suite 1003

Arlington, VA 22202

Phone

703-601-0186

Fax

703-601-0548

## 2012 DoD Loaned Executives

<b>HOME AGENCY</b>	<b>LOANED EXECUTIVE</b>
U.S. Air Force	Pamela Fitzgerald
U. S. Army	Ms. Brenda Jordan MAJ Timothy Butler
U.S. Navy / U.S. Marine Corps	Kyra Rathbun
DIA	Mr. Travis Carver
DoD IG	Mrs. Priscilla Nelms
DLA	Ms. Sheila Pitts
DTRA	Ms. Amy Muensch
NGA	Ms. Karen Willis
OSD	Mr. Nathan Bein
WHS	Ms. Kathi Muhammad





## Appendix B - Key Events and Dates

<b>EVENTS</b>	<b>DATES</b>
DoD LE/CM Initial Planning Session	August 13, 2012
Order Supplies	August 20, 2012
DoD Operations Meeting	August 23, 2012
Army Operations Meeting	August 23, 2012
Navy Operations Meeting	August 23, 2012
MANAGE Training	August 23, & 28-31, 2012
Initial MANAGE Supply Orders	August 20, 2012
CFCNCA Leadership Conference	September 5, 2012
DoD CFC Kickoff	September 13, 2012
Pentagon Charity Fair	October 2-4, 2012
Mid-Campaign Rallies	October 2012
Best Practices Forum	November 8, 2012
DoD Marketing Contest Deadline	December 6, 2012
DoD Marketing Contest	December 8, 2012
Official Campaign End Date	December 15, 2012
CFCNCA Campaign Contest Deadline	January 25, 2013
DoD CFC Awards Ceremony	TBD
NCA CFC Finale / Awards Ceremony	March 14, 2013





## **Appendix C - SUPPLIES**

If you have a large campaign, you may want to appoint a Logistics Coordinator to oversee campaign logistics. The Logistics Coordinator will coordinate the ordering campaign supplies, supplies and equipment for special events, acquisition of storage space, and distribution to the campaign team members.

Each campaign orders and distributes its own supplies. The campaign team members who are trained to access the online campaign system will be able to place orders. Therefore, if you have a Logistics Coordinator ensure they get the training and the required log-in ID and password. The CM, Deputies, and others who are part of the core team should have this training to assist in the ordering process if needed. The delivery of CFC supplies is contracted through a CFC vendor.

Supplies that are ordered online through the CFC system will automatically calculate the quantities needed based on the total number of employees in your organization. These quantities can be adjusted as needed when justified. i.e. the total does not account for additional organizations for which you may have campaign responsibility that are not included in your organization's total.

*Because of the heightened security related to DoD deliveries, the CM needs to notify the supply distributor of any special instructions when ordering supplies. Agencies that do not accept normal deliveries, or agencies that want to arrange for their own pick-up orders, can call the Logistics Manager, to discuss delivery alternatives.*

Develop and implement an efficient delivery system with addresses and points of contact for campaign materials, especially for various building locations. When deciding on delivery locations, keep in mind that the CFCNCA vendor *will not* make deliveries throughout the building—only one drop-off location is permitted. This might require a plan to move supplies from a loading dock to the storage room or multiple storage locations.

Supplies must be ordered 10 business days in advance of any training or kick off events. VCMO maintains only very limited supplies to address small emergency situations and cannot provide large quantities of supplies. The following describes the supplies that are available:

### **STANDARD CFC SUPPLIES**

CMs or their designees are responsible for ensuring they obtain adequate supplies for their individual campaigns. They are ordered as follows.

**Ordered through online supply system:**

- Pledge Forms
- *2012 Catalog of Caring*
- Pledge Form Carriers (Form 100)
- CFCNCA Deposit Bags (Form 300)
- Thank you cards
- Key Worker kits
- Posters

**Order from LEs:**

- Banners (5.5 ft. by 2 ft.)
- Eagle and Double Eagle pins
- Certificates

**Online Forms**

- CFCNCA Deposit Form (Form 200)
- Special Events Proceeds Form (Form 150)

**HELPFUL HINTS**

Consider the following when determining and managing your campaign supplies.

1. Identify supply needs from members of your campaign committee. Compare the results to the automatically generated numbers in the online supply system to ensure they are comparable. Make adjustments as needed.
2. Determine storage room location and a schedule for distribution of CFC supplies to Team Coordinators, Team Captains, and/or Key Workers.
3. Develop and implement an efficient delivery system with addresses and points of contact for campaign materials, especially for those components at various building locations.
4. Maintain inventory information.

**DELIVERIES TO THE PENTAGON & MARK CENTER**

The phone number for the Pentagon Dockmaster is 703-692-8000. The phone number for the Mark Center Dockmaster is 571-372-7107. Each account requiring supplies to be delivered to the Pentagon Remote Delivery Facility (RDF) or the FSD/Mark Center shall establish an Integrated Trafficking System (ITS) account through the Dockmaster. After the account is established, you will use the electronic system to schedule deliveries.

Each request must include the delivery date, the name(s) of the driver(s), the assistant driver, and the vehicle license plate. Once approved, no changes are permitted. Changes will cause the delivery to be rejected.

A minimum of 3 days is required from the date your request is approved in the ITS system to the date and time of the requested delivery. The 3-day time period is firm, and is not subject to negotiation. You will also need to request supplies be moved from the dock to a specified room number within the Pentagon (parts of the Pentagon are restricted from using jacks for delivery) as supplies are not permitted to remain on the dock for any period of time.

When supplies arrive, check the order to assure you have received what you ordered. If your order is incorrect, please contact the VCMO Logistics Manager by the end of the day.





## **Appendix D - SPECIAL EVENTS**

Special events can help make the campaign fun and exciting. Most campaigns have at least three special events: (1) a kickoff, (2) an awareness activity during the campaign, and (3) a closing ceremony to thank the campaign volunteers and donors and to celebrate your successful campaign. It is helpful, when your resources permit, to have an Event Coordinator responsible for organizing your special events.

### **KEY FUNCTIONS AND RESPONSIBILITIES**

Below are listed suggested approaches to making your special events easier to manage.

1. *Plan.* Discuss events with the campaign leadership and your LE, as well as your legal and ethics offices prior to implementation. Be sure that all activities meet the Standards of Ethical Conduct for Employees of the Executive Branch and CFC requirements. The legal and ethics offices have the final say on the legality of any special event.
2. *Verify planning information.* Determine the number of events and the dates at the beginning of your campaign planning process. If you have multiple units in your agency that are planning events, organize a campaign team calendar to prevent overlap or conflicts.
3. *Don't wait until the last minute.* Involve your agency and campaign leadership by getting events on their calendars as early as possible in the planning process.
4. *Choose locations wisely.* Be familiar with the events' planned locations. Know location capacity, security procedures, parking requirements, etc. Be able to provide complete security procedures for the charity representatives attending or speaking at events.
5. *Process any checks and/or cash collected securely and quickly.* Ensure event finances are properly managed and internal controls are maintained by (1) having checks and cash verified by more than one person prior to making deposits, and (2) ensuring the cash/checks are properly protected to prevent theft throughout the process. If there are large amounts of cash involved, do not wait until your regular deposit. Make a special deposit for the event. Waiting to make the deposit only makes it more difficult to keep the funds secure. Once the funds are collected and verified, follow these steps.

- a. Fill in line on the Key Worker's summary (Form 100) earmarked for any proceeds received from special events.
  - b. Complete "*Special Events Proceeds Form*" (Form 150), available for download from the CFCNCA website, and have it signed by two responsible employees.
  - c. Attach the signed Form 100 to the event proceeds and insert it into the white pledge form carrier (Form 100). The other copy of the form should be kept for your records.
  - d. Complete line item in the on-line Form 200 in MANAGE to account for donations.
  - e. Include this amount on the "Total Special Event Proceeds" line on the Deposit Bag.
  - f. The "*Special Events Proceeds Form*" should not be used to account for pledge form donations.
6. *Involve the charities.* Contact the CFCNCA Charity Outreach Coordinator to plan your charity fairs and charity speakers. You can also ask your LE to assist in getting a charity speaker. If you have a personal contact with a particular charity, please make CFCNCA aware that you are inviting the charity to your event to ensure equal opportunities for all charities.

## **EXAMPLES OF SPECIAL EVENTS**

There are numerous types of special events. Talk to the prior year's CM to determine what was particularly well received by your organization, and which events did not garner a lot of interest or participation. Also determine if any events required special approval or were disapproved by the legal or ethics office. Plan accordingly. Some examples of special events used in the past are listed below. Do not limit yourself to these suggestions, be creative and innovative in your approach. A fresh approach will attract new interest in the campaign.

- Auction/Silent Auction
- Bake Sales<sup>2</sup>
- Pie in the Face
- Races/Walk-a-Thon
- Water Dunking
- Drawings<sup>3</sup>
- Hot dogs, chips, and soda
- Breakfast
- Chicken, Fries, and Cola

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<sup>2</sup> Food associated fund raisers must adhere to the building and local policies in effect for the type of food involved.

<sup>3</sup> All employees must be afforded participation in CFC drawing/giveaways regardless of their participation in the CFC. Group funds collected from special fund raising events are to be donated as "undesignated" unless individual employees designate a specific participating organization or federation by filling out a Pledge Form for the designated donation amount.



- Crossword Puzzles
- Bingo
- Coin Containers for spare change
- Penny Wars
- Athletic Tournaments<sup>4</sup>
- Talent show
- Chili cook off
- Book Sale
- Car Wash
- Charity Fair

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<sup>4</sup> Athletic events may require special permission or special forms depending on your agency's requirements, type of event, location, and time it will occur. There are Worker's Compensation and other considerations in agency sponsored athletic events.





## **Appendix E - CHARITY OUTREACH**

There are occasions throughout the campaign when charities have an opportunity to directly meet with campaign leaders and employees. We have developed guidelines to facilitate a fair and impartial campaign and provide unbiased opportunities for all charities as enumerated in 5 CFR Part 950 §950.105 (b) and (c). Charities that wish to participate in Charity Outreach Program activities must agree to adhere to these guidelines. For more information or questions regarding the following agreement, contact the CFC Charity Outreach Coordinator at (202) 465-7200. The following guidelines should be provided to participating charities.

### **GUIDELINES FOR CHARITY PARTICIPATION**

The purpose of these guidelines is to administer events fairly and equitably for all approved charities within the campaign. It is important to not give the appearance of bias towards one or several charities, but to provide opportunities for a variety of charities to participate in your events. For example, you can choose to have a variety of local, national, and international charities with a variety of purposes such as feeding programs, medical services, educational services, etc. You can also choose charities that are particularly meaningful to your organization. For example, as a DoD organization you may be interested in having some charities that serve veterans or military families.

To participate in CFCNCA activities, a CFCNCA approved charity must have an organization leader read, sign, and return a charity participation form to the PCFO. It is also recommended by the PCFO that all of the charities attend a charity briefing prior to participating in campaign events, but it is not required. Basically, the charities agree to the following conditions in order to participate:

1. We understand that when we are at a CFC event, we represent not only our organization, but **all** charities in the campaign, as well as the CFC according to CFC regulation 5 CFR Part 950.105(b) and 950.105(c)2(i).
2. Our organization has representatives who are willing and able to enter United States Government facilities in the Washington Metropolitan Area to attend charity fairs.
3. We will make sure that any staff or member charities attending charity fairs know the CFC Charity Outreach Program requirements.
4. If our organization agrees to attend a charity fair, our representative must arrive in a timely fashion and with appropriate photo identification issued by a valid government agency (driver's license, U.S. Passport, or other).
5. If our representative is unable to attend (after confirming participation), the representative will inform the CFCNCA and the Federal agency organizer as soon as possible;

6. Our representative shall greet, receive, and thank all people with equal respect, dignity, enthusiasm, and excellent customer service. Our representative will not use aggressive tactics to solicit the attention of people attending the event or solicit direct donations at the event.
7. Our representatives will not attend any event to which our organization has not been invited.
8. At charity fairs, we will only give away promotional items. We understand that the sale of items is prohibited. Our representatives will check with agency sponsors before engaging in raffles or gaming.
9. We will use only the display area allotted to us with the understanding that we may have to share table space with other charities. We will not block the view of other charities' tables with large displays, posters, etc.
10. We will treat all other charities with respect and dignity.
11. We will attend all CFCNCA events in professional attire (i.e., no shorts, flip flops, etc.).
12. We will inform CFCNCA immediately of any significant problems encountered at an event.
13. We will inform CFCNCA of any change in our organization's contact information.

## **ADDITIONAL CONSIDERATIONS**

As the CM you may be approached by a charity, a group of charities, or a marketing representative with materials listing selected charities in the campaign. Sometimes the materials turn up in your office or at your receipt point for campaign materials. **DO NOT** distribute these materials. You can only distribute the official CFCNCA Catalog of Caring.

Reference: *The Combined Federal Campaign Rule and Notice, Subpart D - 950.401(b) (c) and (d), Campaign and Publicity Materials*. CFC campaign workers and members of the Local Federal Coordinating Committee (LFCC) are prohibited from handling, during the Campaign, any campaign, promotional, or educational material for any specific charity, or group of charities, other than the OFFICIAL CFC materials distributed by the CFC Office. "Campaign personnel are to be particularly aware of the prohibition to not assist any voluntary agency or federated group to distribute any type of literature, especially during the campaign period". (From 950.401(d)).

If you have any questions, or if you receive unsolicited materials, call the VCMO or contact your LE.

Charities and federations are encouraged to publicize their activities outside Federal facilities and to broadcast messages aimed at Federal employees in an attempt to solicit their contributions through the media and other outlets. They may communicate with Federal employees in writing through USPS mail addressed to the employee at their Federal workplaces as long as these mailings do not interfere with Federal government activities. The head of the Federal agency determines the agency's policy on such mail solicitations.

Charities can also distribute their brochures to Federal personnel in public areas at or near Federal workplaces provided that the manner of distribution accords equal treatment to all charities and that the distribution does not interfere with Federal government activities.

The distribution of educational materials by the charities or federations, or the provision of other services to employees at Federal establishments, must be handled through the agency's personnel offices, occupational health units, or other appropriate agency components. It should not be handled by the CFC CMs, Coordinators, Team Captains, Key Workers, or other members of the campaign team including the LE.





## **Appendix F - MANAGING DONATIONS**

The CM, together with the Finance Manager if applicable, performs financial analysis of the campaign throughout the campaign. It is essential to ensure that the correct information is going into the CFC online financial system to manage donations. The following are suggestions for ensuring that your campaign donations are properly managed and the financial status of the campaign is communicated. The suggestions are not all inclusive and if you encounter an issue that is not covered, contact your LE.

### **CFCNCA GEOGRAPHIC AREA**

CFCNCA is the CFC campaign for Federal employees—civilian and military—whose duty station is located within the CFCNCA geographic area. In addition to Washington, D.C., the CFCNCA campaign includes Prince George, Montgomery, Calvert, and Charles Counties in Maryland; Arlington, Fairfax, Loudoun, and Prince William Counties in Virginia; and the separately incorporated cities of Alexandria, Falls Church, Fairfax, Manassas, and Manassas Park in Virginia.

For CFC purposes, employees donate to the campaign where their duty station is physically located, NOT where their position appears on the Unit Manning Document (UMD). For example, if an employee's position is listed on the UMD at the organization's headquarters in the CFCNCA area, but the employee's duty station is New Orleans, he/she would donate to the CFC campaign in New Orleans. This requirement enables donors to support local charities in the area where they live as charity catalogs are specific to the local CFC and include only the local charities in that geographic area. Under current CFC requirements, employees cannot donate to local charities outside their geographic area. If they want to donate to a local charity outside their geographic area, they must donate directly to the charity.<sup>5</sup> National and international charities do not have this same limitation and may receive donations from donors in any geographic area as these charities are listed in all CFC catalogs.

Therefore, a DoD employee temporarily located in the CFCNCA area does not make the employee a part of the CFCNCA campaign from the standpoint of payroll deductions, nor can they designate local charities in the location where they reside. They can participate in events, and if they want to make cash or check donations, they can do so. They can designate national or international charities on these donations. However, if they want to provide credit towards their home campaign's goal, or donate to a local charity in their home campaign area, they would need to make the donation through that campaign. Otherwise, the donation will be credited to the accounting unit giving the event or accepting the donation.

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<sup>5</sup> The CFC-50 Commission has been evaluating the possibility of "universal giving" which would enable donors to donate to any approved CFC charity in any geographic location, but this is not in place currently.

Contractors cannot be solicited for donations even though they are located within the CFCNCA area. They can attend events and make cash or check donations if they so choose. They can designate the charities listed in the CFCNCA catalog for receipt of the donation. They cannot do payroll deductions. The accounting unit given credit for the donation would be the unit giving the event or accepting the donation.

### **PLEDGES FROM OUTSIDE THE CFCNCA GEOGRAPHIC AREA**

As the CM, you and your team are not allowed to solicit or to accept pledges from outside of the CFCNCA geographic area. Some Federal departments and agencies have attempted to conduct national campaigns for their employees by having all employees participate in the CFCNCA campaign. This is contrary to CFC regulations. CFC regulation 5 CFR § 950.103(h) requires "A Federal employee may participate in a particular CFC only if that employee's official duty station is located within the geographic boundaries of that CFC." Federal employees can determine their appropriate CFC by visiting OPM's CFC website at [www.opm.gov/cfc/Search/Locator.asp](http://www.opm.gov/cfc/Search/Locator.asp) and selecting the State where their official duty station is located.

### **MILITARY MEMBERS NOT ASSIGNED WITHIN THEIR SERVICE**

There are numerous members of the military (Army, Navy, Air Force, Marines, or Coast Guard) who are assigned to elements which are not connected to a base, office, or agency within their service. These service members may be assigned to agencies such as the Defense Information Systems Agency, Defense Finance and Accounting Service, Defense Logistics Agency, Washington Headquarter Services, or other government locations. This also includes all military personnel assigned within DoD, but outside of their home service or offices.

The payroll for these service members is not processed by the same payroll office as the agency employees. Therefore, the agencies cannot process payroll deductions for military accounts. The white and blue copies of the Pledge Form should be handled as is done for all other pledges. Only the yellow portion requires special handling.

When a military member not assigned to her or his home service makes a pledge to the CFC, the CM must send the yellow payroll copy of the Pledge Form to the proper payroll office. Efficient handling of these pledges will ensure payroll deduction begins with the first pay period of the 2013 calendar year. The following offices can provide proper handling of these payroll deductions.



**Marines**

Attn: CONAD (S-1)  
H&S BN HQMC Henderson Hall  
Bldg 29, Room 205  
1555 Southgate Road  
Arlington, VA 22214

**Army**

Department of the Army  
Office of the Administrative Assistant  
Resources and Programs Agency  
ATTN: AARP-ZA (Karen Kane, 2SE5209)  
9301 Chapek Road  
Fort Belvoir, VA 22060

**Air Force**

11<sup>th</sup> Wing/FMFS  
110 Luke Avenue, Suite 190  
ATTN: Mr. Howard Seeley  
“For forwarding to correct processing office”  
Bolling AFB  
Washington DC 20032

**Navy**

PSD Washington DC  
Naval Station Washington Bldg 92  
235 Wick Drive SW  
Anacostia Annex, D.C. 20373-5803

**U.S. Coast Guard**

While the U.S. Coast Guard is one of the Armed Forces, it does not come under DoD for payroll purposes. Yellow pledge forms should be forwarded to the PCFO for CFCNCA who will send them to the Department of Homeland Security.

The address for the PCFO for CFCNCA is:

Global Impact, Inc.  
750 17<sup>th</sup> Street, NW  
Washington, DC 20006  
Attn: Mr. James Francavilla

**DIRECT PAYMENTS TO CHARITIES**

The CFCNCA cannot process checks made payable directly to charities. Therefore, ensure your team does not accept the checks. All checks must be made payable to CFCNCA. In the event a check made payable to a charity is found during auditing of a deposit, the pledge will be returned to the contributor and an audit correction entered. If a donor does not want to make the check to CFCNCA, instruct the individual to send the check directly to the charity.

**COMMUNICATIONS**

Keep your agency components informed as to the number of pledges and amount of money raised. Some agencies use goal board posters or display the amounts on the agency intranet. An added bonus to communicating this type of information is that the information can identify any strategic changes that need to take place in how the campaign is being conducted. The information can pinpoint when you need to ramp up activities and when things are ahead of schedule. This can also be the means of letting the components know their status in achieving organizational awards.

## **MAKING DEPOSITS**

If you are fulfilling the duties of a Team Captain, Coordinator, or Finance person, refer to the section entitled Processing Pledge Forms in the 2012 Guide for Key Workers and Team Captains (will be distributed at the Leadership Conference) for the instructions. CMs, who have the help of a Team Captain, Coordinator, or Finance person, will want to review the contents of the CFC Deposit Bag (Form 300) before they are sealed and delivered to one of the assigned credit union locations. CMs will want to refer to the section entitled Processing Pledge Forms in the 2012 Step Guide for Key Workers and Team Captains for directions on filling out the CFC Deposit Receipt (Form 200).

## **MONITORING OPEN DEPOSITS**

On at least a weekly basis, check the list of open deposits in the online CFC finance reports. For those deposits that have been open for more than 10 days, check with the contact persons to find out when they delivered the deposits bags to the drop off locations. All deposits have a unique number and should be easily identifiable. The person making the deposit should also have a copy of the receipt obtained when the deposit was made. All records of campaign deposits should be kept in one location to make it easier to track and manage deposits.

If you find that delays in processing deposits are consistently occurring at one deposit drop location, notify your LE so that it may be reported to the CFCNCA for resolution.

## **MISROUTED YELLOW PLEDGE FORMS AND CONFIDENTIAL PAYROLL DONATIONS**

On a routine basis, any yellow pledge forms that were inadvertently submitted to the CFCNCA in the white deposit envelope—Pledge Form Carriers (Form 100)—will be returned to the CM by the LE for correction. In addition, you will be sent the payroll copy yellow pledge forms for confidential payroll donations. You should direct these to the appropriate payroll offices as soon as you receive them. These will be sent to you in Pledge Form Return Packages (Form 400).

It is important to remember that the LE cannot open the return envelopes to assist you in any way. LEs are prohibited from any involvement in the finances of the campaign. They can only return the Form 400 with its contents unopened to you.

## **REPORTS**

The VCMO tracks the contributions of each agency throughout the campaign through the online campaign finance system MANAGE. These numbers are reported every Monday to DoD leadership to enable them to track campaign progress on an overall and individual command or unit basis. The DoD consolidated Weekly Report will be sent electronically to Chairs, Vice Chairs, and CMs beginning October 15, 2012.

VCMO downloads these reports every Monday morning. Deposits should be made on Fridays by 5:00 PM in order to provide the most up-to-date information for these reports. These reports will show progress towards goals, discrepancies in audited amounts from dollar amounts reported, and other campaign statistics.

To ensure the accuracy of the reports, you or your Financial Manager should check the list of open deposits in MANAGE on a weekly basis. For deposits that have been open for more than 10 days, check with the contact person(s) to find out when they delivered the Deposit bag to the drop off locations. *As an added check, you will be notified when a Deposit has been open more than 17 days.*

LEs check discrepancy reports each week to help resolve any issues. For example, if your agency reported more money than shows on the audit report the LE will help resolve the problem. With the information about the bag number and where and when it was deposited, VCMO can work with you and the PCFO to determine where the deposit is in the process—not yet deposited, mistakenly credited to a different account number, etc. Another example would be when the audit shows a different total dollar amount from that reported for a specific bag. If the audit shows a larger number than reported, this may be due to confidential donations or incorrect totals on the Form 100 white envelope. If it is less than shown, VCMO can check to see if there was a math error or missing money in the bag. Regardless of the situation, the LE and VCMO staff will help you resolve any audit issues to help provide accountability for all funds collected.

In most cases, deposits should show up as audited within a week. The process may take longer at later points in the campaign when there is a mass influx of deposits.

## **MANAGE™**

The current system used in the CFCNCA campaign for managing campaign finances, and ordering supplies and awards is called MANAGE.<sup>6</sup> This is a proprietary system that has been put into place by the current PCFO for CFCNCA. MANAGE integrates the pledge deposit information into various reports that can enable you to better manage your campaign. CMs can track their progress, order supplies and awards; and prepare reports using MANAGE™. It is designed to provide users access control to parallel their role in the campaign.

The website can be accessed at <https://manage.cfcnca.org>. As a CM, you (and other members of your team) will receive mandatory training on using MANAGE. User IDs and Passwords will be issued after training has been completed. Once you have completed training, your information will be entered into the system to provide 24/7 access to campaign information.

In April, your agency was asked to provide manpower information to assist in the computation of campaign goals and to assist in the ordering of campaign materials. Review your manpower numbers entered into MANAGE as a result of this process and determine if the numbers match

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<sup>6</sup> Each PCFO determines which financial/management system they want to use for tracking campaign finances and other functions.

what you have.<sup>7</sup> Notify VCMO of any changes needed immediately. Once the campaign begins, no changes are permitted.

As the CM, you will determine who will enter pledge deposit information into MANAGE. Some campaigns have severely limited access while others have permitted wide access. Determine who will enter pledge deposits into MANAGE and ensure they get the appropriate training and access to the system. These people will also be able to view all the CFC data for your agency. The complete guide to using MANAGE can be downloaded from the CFCNCA.org website.

## **ENSURING THE ACCURACY AND SECURITY OF PLEDGE FORMS**

People make mistakes and Pledge Forms may have inaccurate or missing information. The CFCNCA must then return the Pledge Forms to your agency for correction. We encourage Key Workers, Team Captains, Coordinators, and Finance persons to review all Pledge Forms, Pledge Form Carriers (Form 100s), and Deposit Bags to ensure completeness and accuracy of the information as outlined below. Within your agency or group, the organizational structure may vary, but the process outlined below should be followed.

It cannot be emphasized too often the importance of handling the Pledge Forms with the utmost care as they contain Personally Identifiable Information (PII). They must be protected and kept confidential at every step of the process. This is another reason for processing the forms as quickly as possible and getting them out of your possession and into the proper hands—the depository and the payroll office.

### **KEY WORKER'S REVIEW OF THE PLEDGE FORM**

The Pledge Forms consist of three parts: white for the white deposit envelope, yellow for the yellow payroll envelope, and blue for the donor's receipt. The Key Worker is responsible for reviewing the Pledge Forms to ensure the donor has correctly filled out the required information and separating the forms for the appropriate Pledge Form carrier/envelope. If the donor has not removed the blue copy prior to turning in the form, the Key Worker should return the blue copy to the donor after verifying the information on the Pledge Form. If the Key Worker finds errors on the form, the entire form should be returned for correction or the donor provided a new form to fill out correctly.

The Key worker should ensure that the form has been accurately completed by reviewing the following information:

1. Is there a CFC Reporting Number,<sup>8</sup> and is it correct?
2. Is the employee a part of the CFCNCA campaign based on their duty station?

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<sup>7</sup> You may use the manpower numbers in MANAGE to determine the number of Key Workers you agency will need. These numbers will also automatically translate into your supply orders for quantities based on established parameters.

<sup>8</sup> This is your assigned CFC 5-digit agency/unit number.

3. Did the donor provide a work phone number?
  - a. Is the math correct?
  - b. Is the dollar amount on the form the same as the cash/check?
  - c. Is the amount per pay period correct based on the pay cycle—26 pay periods or 12 pay periods—and does the calculation match the total amount of the gift?
  - d. Does the “annual amount” equal the “total gift”?
4. Are the distributions for various charities entered—5 digits for each charity selected? The Key Worker is not responsible for determining that the codes entered are correct. That is the donor’s responsibility. The Key Worker should only determine whether the codes are the correct number of digits.<sup>9</sup>
5. If it is a *payroll deduction*
  - a. Is it signed and dated?
  - b. Does it contain the full name, street address, and SSN of the donor? Is this information readable? The payroll department must be able to read the form to ensure it is properly posted to the right donor’s payroll account. Remember that the payroll form is the second sheet in the Pledge Form and the donors need to press down firmly when filling out the front sheet for this sheet and the donor copy (blue) to be readable.
  - c. Cash and check donations that are accompanied by a Pledge Form do not require a signature, address or SSN on the pledge form. It should contain the person’s name, however, as it is a receipt.
  - d. Make sure the donation is from a Federal employee. Contractors cannot do payroll deductions through the CFCNCA although they can make cash or check donations.

### **KEY WORKER’S REVIEW OF THE PLEDGE FORM CARRIER**

After reviewing the Pledge Forms, the Key Worker should follow the instructions for processing the Pledge Form in the Pledge Form Carrier (Form 100). The Form 100 is comprised of two attached envelopes – one white and one yellow—as explained in the “Key Workers Campaign Step Guide” which is included in the Key Workers Kit. *The colors of the envelopes match the colors of the Pledge Form parts that go into the envelopes—the white forms go in the white envelope and the yellow forms go in the yellow envelope.*

When a donor turns in a Pledge Form to the Key Worker, the Key Worker should separate the copies after they review the Pledge Form for accuracy as noted in the prior section:

- The *blue* copy is given to the donor as a receipt.
- The *white* copy is put into the white deposit envelope.
- The *yellow* copy goes into the yellow envelope *if the donation is a payroll deduction*. If the donation is not a payroll deduction, but is a receipt for a cash or check donation,

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<sup>9</sup> Designations made with incorrect charity codes that cannot be resolved or corrected will become undesignated contributions. Differences in dollar amounts will be apportioned. For example, if you pledge \$20 to five designated charities (\$100 total), but the stated total contribution is \$120, the additional \$20 will be apportioned as the designated amounts were apportioned. The payroll deduction is based on the total gift amount.

give the yellow copy and the blue copy to the donor. Key Workers should not maintain or be responsible for the destruction of extra copies of Pledge Forms or Pledge Form pages because of the potential violation of PII requirements.

It is important to remember that within DoD, you may need *two* yellow payroll envelopes—one for civilians and one for military employees as they are paid by different DoD payroll offices. The easiest way to do this is to make separate Form 100s for the two groups. You can then include the two white carrier envelopes in the same deposit bag—one for the military pledge forms and one for the civilian. You will need to verify that the payroll forms are separated and then delivered to the correct payroll offices. For some commands, this may involve having to mail the yellow envelope(s) to the correct payroll office. Additionally, if you have the two groups you may want to consolidate the deposits at a higher level than an individual unit to save yourself the time of dealing with 1 or 2 Pledge Forms for a group and having to fill out a number of different Form 100s.

### **TEAM CAPTAIN/COORDINATOR QUALITY ASSURANCE REVIEW**

The Team Captain or Coordinator should follow the same review process as the Key Worker to ensure accuracy; and that the proper forms are in the proper envelope—white in white, yellow in yellow. To provide this quality assurance review, CMs should instruct their Key Workers NOT to seal the Carriers and have the Team Captain, Coordinator, or Finance person seal it, depending on how many persons will review the Pledge Forms and Carriers. When everything is verified as correct and complete, the last reviewer should seal the Carriers and ensure proper distribution to the depository or payroll office.

The Team Captain or Coordinator’s review should particularly focus on ensuring that:

1. Checks and cash are attached to the white copies for non-payroll contributions. Place the check or cash into an envelope and staple the envelope to the white copy. For cash, annotate the amount on the envelope and make sure it matches the white copy of the Pledge Form. Checks should also match the amount and name on the Pledge Form.
2. No white forms are in yellow envelopes and vice versa.
3. The totals on the white carrier match the totals of the contents in the carrier—all contents must be accounted for on the front of the white carrier and all totals must match. This includes verifying any amounts for events or for annotating that confidential pledges<sup>10</sup> are included with the carrier. Confidential pledge envelopes should be attached to the appropriate white carrier, not placed inside the carrier

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<sup>10</sup> Every employee has the right to give a confidential donation/pledge. These are to be sealed in a white envelope by the employee and he/she must write “CONFIDENTIAL” on the front of the envelope. The envelope is then give to the Key Worker by the employee. These envelopes are NOT to be opened by anyone other than the auditors who will verify the amounts, etc., after the carrier has been turned in to the deposit location. Only the number of confidential donations/pledges envelopes is noted on the front of the white deposit envelope. The amounts of confidential pledges will show up in your total donations as a larger deposit amount than you entered in MANAGE and on the white deposit carrier.

4. The yellow Carrier contains only the yellow (payroll) copies of the Pledge Forms, and that the military and civilian payroll copies are in separate yellow envelopes.

Up to 20 Pledge Forms and other event monies or confidential donations can be put into each Pledge Form Carrier, but they must all have the same CFC account reporting number.<sup>11</sup> *If you are a larger organization that submits pledges from several sub-organizations which have their own subaccount numbers, Pledge Form carriers for each subaccount should be prepared. You may include more than one Pledge Form Carrier (white envelope) in the Deposit Bag (Form 300).*

### **COMPLETION OF DEPOSIT BAG AND INPUT TO MANAGE**

The CM should input deposit information into MANAGE and make the actual deposits unless you have designated someone else to perform these functions such as the Finance Manager. This may be more than one person depending upon the size of your organization.

The person responsible for these tasks should print out two copies of the Form 200 (which is basically a deposit slip) and place the Pledge Form Carriers in the CFC Deposit Bag (Form 300). However, before doing so, the designated individual should:

1. Ensure that all Pledge Form Carriers contain the organization's correct CFC reporting number.
2. Complete the Deposit Bag following the instructions.
3. Envelopes marked confidential are stapled to the appropriate Pledge Form carrier and that the number of confidential gifts (envelopes) is annotated on the outside of the Deposit Bag.

Once everything is verified as correct, the deposit can be entered into MANAGE. It is important that the Deposit Bag be taken to the appropriate deposit location *as soon as possible, and preferably the same day as entered in MANAGE*. This not only provides security for the contents, but also ensures the deposit record in MANAGE matches the deposits. *At a minimum, deposits should be made weekly before 5:00 PM on Friday to ensure proper reporting. Deposits are not to be held for extended periods or until the end of the campaign even if they are securely locked up.* The CM, or the Finance Manager if appropriate, should monitor MANAGE to ensure that deposits that have been entered in the system have actually been deposited.

The person doing these functions should ensure that they get a deposit receipt from the deposit location and that they maintain the receipt together with copies of the fronts of all Pledge Form Carriers (white envelope) related to that receipt to provide a record of what was deposited and to provide an audit trail if needed to track the deposit.

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<sup>11</sup> Most organizations have only one CFC reporting number. However, larger commands may choose to track their sub-commands by designating individual subaccount CFC reporting numbers in order to more accurately track campaign progress.

### **COMPLETION OF PAYROLL CARRIER**

Based on the accuracy of the other reviews, the contents of the Pledge Forms included in the yellow Pledge Form Carrier should be correct. The designated person should verify that civilian and military payroll deductions are included in separate envelopes and that they are delivered to the correct payroll office. They should also verify that the front of the carrier is correctly filled out, including the designated service organization, and that no white or blue forms are in the envelope. The envelope(s) should then be delivered to the appropriate payroll office. A record should be kept showing the carrier number, the date it was delivered, and who received it in the payroll office in case any questions arise.





## Appendix G – Campaign Tool Box

As the CM, you will have a number of events and activities you will be managing. The CFC Tool Box contains examples of agendas, answers to donor questions, and other information that may be helpful to you in planning and conducting the campaign. Feel free to adjust the examples to meet the particular needs of your organization and activities, as well as the configuration of your campaign team.

### REASONS FOR GIVING TO CFC

Reasons for giving to CFC:

- **Impact** – Improves health and well-being of community.
- **Accountability** – Oversight and Management by Federal workers.
- **Efficient** – Low overhead (less than nine per cent).
- **Confidence** – Participating organizations regulated by OPM.
- **Convenient** – Payroll deduction spread over a year.
- **Choice** – Over 4,000 organizations from which to choose.
- **Charities receive portion of undesignated funds**

### WHY PAYROLL DEDUCTION?

Reasons for Using Payroll Deduction

- ✓ It's easy! Fill out one form to cover your donations for an entire year
- ✓ It's safe! All charities are reviewed and approved by Federal employees annually
- ✓ It's continual giving! Every pay day you are reminded of how generous you are
- ✓ You can give more, more affordably because the donation is spread out over a year
- ✓ Payroll gifts normally total four to five times the amount of a one-time gift
- ✓ Your charity receives a portion of the undesignated funds as well as their designated funds
- ✓ It allows your charity to plan on regular distributions from the CFC
- ✓ It can cut administrative and fund raising costs for your charity
- ✓ You can say "I gave at the office" and it will be true

## **WHAT A GIFT CAN BUY**

You may get the opportunity to provide potential donors information on what a CFC donation can accomplish. Examples are included below.

### **BI-WEEKLY PAYROLL DEDUCTIONS**

- \$100 Provides 1 month's accommodations near the hospital treatment center for the families of eight injured soldiers.
- \$ 50 Vaccinates 1,300 people against measles, meningitis, polio and other epidemics
- \$ 25 Serves 260 meals to the homeless.

### **MONTHLY PAYROLL DEDUCTIONS**

- \$100 Feeds 4 children in Haiti for 1 year.
- \$ 50 Purchases essential supplies to build and repair a home for 1 low-income family in the U.S.
- \$ 25 Protects 4 square miles of ocean for 1 year

## **INSPIRATIONAL THOUGHTS**

"I am only one, but still I am one. I cannot do everything, but still I can do something; I will not refuse to do the something I can do." Helen Keller

"Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has." Margaret Mead

"It is one of the most beautiful compensations of this life that no man can sincerely try to help another without helping himself." Ralph Waldo Emerson

"Keep hope alive." Martin Luther King, Jr.

"You cannot hope to build a better world without improving individuals. We all must work for our own improvement and at the same time-share a general responsibility for all humanity." Marie Curie

"If a free society cannot help the many who are poor, it cannot save the few who are rich." John F. Kennedy

"Kindness is the language which the deaf can hear and the blind can see." Mark Twain

"No act of kindness, however small, is wasted." Aesop

“Remember, we all stumble, every one of us. That’s why it’s a comfort to go hand in hand.”  
Emily Kimbrough

“We make a living by what we get, but we make a life by what we give.” Winston Churchill

“We began by imagining that we are giving to them; we end by realizing that they have enriched us.” Pope John Paul II

“Our greatest destiny is to serve ourselves and our fellow man (and woman).” Franklin D. Roosevelt

“If you are kind, people may accuse you of selfish, ulterior motives; be kind anyway. The good you do today, people will often forget tomorrow; do well anyway. Give the world the best you have, and it may never be enough. Give the world the best you’ve got anyway.” Mother Theresa of Calcutta

“When you were born, you cried and the world rejoiced. Live your life in such a manner that when you die, the world cries and you rejoice.” Old Indian Saying

“You must be the change you wish to see in the world.” Mahatma Gandhi

“To laugh often and much, to win the respect of intelligent people and the affection of children, to earn the appreciation of honest critics and endure the betrayal of false friends, to appreciate beauty, to find the best in others, to leave the world a bit better, whether by a healthy child, a garden patch, or a redeemed social condition, to know even one life has breathed easier because you have lived, this is to have succeeded!” Ralph Waldo Emerson

Maybe one less child will go hungry,  
Maybe one person’s pain will be eased,  
Maybe one more step will be taken,  
Toward a cure for a fatal disease.  
So ignore the doubters and cynics,  
And be proud of the good that you do;  
Every hope for a better tomorrow,  
All begins with and comes back to you. (Author Unknown)

## **THANKSGIVING MESSAGE**

The arrival of Thanksgiving Day is, for many of us, the beginning of a holiday season that brings us joy and warmth against the cold. I hope that you and those close to you will celebrate according to your beliefs and traditions, and take time to appreciate the good things in life.

Unfortunately, not everyone has reason or means to fully enjoy the blessings which most of us take for granted. That is why the gift you make to the Combined Federal Campaign (CFC) means so much. Whether it is the child who goes to bed hungry, the homeless person braving the cold, the gravely ill man or woman, or the older person who is sad and alone in the world – your gift can help a charitable agency make a difference in someone’s life. And there are so many other worthwhile organizations which are part of the campaign which contribute to humanity’s welfare and well-being.

To those who have already given, thank you for your kindness and generosity. For those who are undecided, I urge you to review the Catalog of Caring or visit the CFC WEBSITE, [www.cfcnca.org](http://www.cfcnca.org) for more information about how you can help. “Be a Star in Someone’s Life,” and your gift may bring a dividend of a cure for a deadly disease, a cleaner and safer environment, or simply the knowledge that you have done something loving and good.

Have a happy and healthy Thanksgiving, and enjoy the holiday season to come.

## **CFC KICKOFF AGENDA**

### **1. Call to order by Vice Chair or CM**

Welcome

Remarks endorsing CFC – Publicly present CFC Contribution

Introduction of Chair or Vice Chair

### **2. CFC National Campaign Video and CFCNCA Video**

### **3. Remarks by Chair or Vice Chair**

Remarks endorsing CFC – Publicly present CFC Contribution

Introduction of Campaign Manager

### **4. Remarks by Campaign Manager**

### **5. CFC Testimonials**

#### **A. Employee**

Describe what happened at a visit to a CFC funded charity.

Discuss how they or their family have been served by a CFC funded charity.

Describe rewarding volunteer experiences at a CFC funded charity.

And/Or

#### **B. Charity Speaker**

Presentation by a representative by a CFC-funded charity. (This can be arranged through your LE with 2 week notice.)

### **6. Presentation by CFC LE**

Reasons for giving.

The “Catalog of Caring.”

### **7. Wrap up by Campaign Manager**

Organization specific logistics:

Introduction of Key Workers

### **8. Close by Vice Chair**

Allow everyone an informed opportunity to give.

Thank employees.

## KICKOFF CHECKLIST

**Confirm date, time, and location of meeting.**

**Publicize event and confirm attendance.**

**Send agenda and talking points to speakers.**

**Check condition of meeting room for its:**

Size, cleanliness, furnishings, ventilation control, location, acoustics, light, accommodations for people with disabilities, and seating capacity.

**Meeting room set up**

Select best seating arrangement.

Test Audio - Visual equipment.

Check lighting controls.

Check electrical outlets.

Place tables for displays, refreshments, and door prizes.

**Audio Visual Set-up**

Projection equipment on hand and in operating order.

Operator available.

Equipment focused, volume set.

**Post Meeting Room Check**

Collect CFC material.

Check room for forgotten property.

Remove signs and displays.

Return video.

Leave the room clean.

**Thank those who assisted with the meeting.**

## **MEMORANDUM TO MANAGERS/SUPERVISORS**

### **Subject: Combined Federal Campaign (CFC) Key Workers & Team Captain Support**

As your Fall 2012 Combined Federal Campaign (CFC) Chair, I am looking forward to a very successful campaign. I am confident that our 2012 CFC can be even more successful than last year's; however, I need your help in organizing and structuring our Campaign Team.

It is essential that you ensure each CFC Key Worker is limited to soliciting no more than 15 employees and that each CFC Team Captain/Coordinator is assigned to assist and supervise no more than 15 Key Workers. This ratio is absolutely critical to the success of our campaign because the proven solicitation approach is one-on-one, face-to-face interaction between Key Workers and a limited number of employees. I also urge you to provide sufficient time for your Key Workers and other Campaign team members to participate and perform their respective campaign duties. CFC time away from normal duties is minimized when each CFC Key worker is assigned to no more than 15 employees. The 1 to 15 ratio will also enable the CFC Captains to supervise Key Workers and allow Captains the sufficient time to properly and efficiently perform their vital duties. This proven CFC solicitation arrangement will optimize both your employees' time and CFC participation in your agency. Your supportive endorsement of this campaign approach will optimize overall results.

Each year, the CFC and those who benefit from CFC must rely on the effectiveness of the key fund raising staff. I thank you for your assistance in developing a CFC organization for a high performance campaign.

## **MEMORANDUM TO KEY WORKERS/TEAM CAPTAINS**

### **Subject: 2012 Combined Federal Campaign (CFC)**

I want to thank each of you for undertaking CFC Key Worker or CFC Captain duties for the 2012 CFC effort. For those of you serving as Key Workers, I've requested that your supervisors ensure you have sufficient time to perform your vital duties and make a personal face to face of solicitation for contributions, and that each of you be assigned to solicit no more than 15 employees. This should reasonably enable you to optimize your CFC time and efforts. To those of you serving as CFC Team Captains, please ensure you are assigned no more than 15 Key Workers and that your Key Workers are provided the materials and assistance needed to complete their duties.

This year, I want to urge each of you to follow a proven solicitation approach in which Key Workers first conduct a group meeting with the 15 employees to whom he or she is assigned, and then a one-on-one follow up solicitation with each employee. In the group meeting, Key Workers should appeal for CFC support and participation, and distribute CFC materials. Please follow-up directly with each assigned employee to make your "personal ask" and enable all the opportunity to contribute to CFC.

I'm confident we will make our 2012 Campaign outstanding in every respect. Let's increase our CFC participation, achieve our dollar goal in less time than previous campaigns, raise more dollars than ever before, and achieve the highest possible CFC Unit Award level. On behalf of the many benefiting from your kind and generous work, I sincerely thank you for your Key Workers and Team Captain efforts.



## MEMORANDUM FOR ALL PERSONNEL

### **Subject: Fall 2012 Combined Federal Campaign (CFC)**

The Fall 2012 Department of Defense [Agency Name] Combined Federal Campaign officially gets underway on \_\_\_\_\_. As the Chair for our campaign, I am looking forward to the [Agency Name] in the National Capital Area achieving another successful CFC Fund raising result. Appropriately, the CFC theme this year is “Hope is the Greatest Gift.”

The CFC provides each of us with an annual opportunity to voluntarily help others and ourselves by donating to community, national and international level human, health and environmental service organizations. This year, over 4,400 human and health service organizations are listed in the CFC Catalog of Caring, and given the diversity of those organizations, there is certainly at least one cause deserving consideration for your personal contribution. Please also realize that local military installation-based family support services are listed in the CFC Catalog of Caring and are therefore available for your contributions. These installation services provide critical assistance to our local military families.

The CFC properly encourages contributions via payroll deduction each year. In selecting the payroll deduction option, you will be able to optimize the size of your contribution, as well as more easily manage incremental deductions from your hard-earned pay evenly across the year. For those of you who generously contribute one per cent or two per cent of your base salary to CFC, I encourage you to immediately display or proudly wear your CFC Eagle or Double Eagle Pin during the campaign to help promote optimal personal levels of CFC generosity.

To previous CFC contributors, I applaud your demonstrated kindness. For those of you who intend to contribute again, or on a first time basis, I salute your caring spirit. Please join me, our Vice Chair Mr./Ms. X, your Campaign Manager Mr./Ms. X and the entire Campaign Team in making this our best ever Combined Federal Campaign fund raising result.





## Appendix H – 2011 DoD Communications and Marketing Contest Winners

### Best Special Event:

Large	1 <sup>st</sup> DIA & DIA, 2 <sup>nd</sup> NAVSEA (Tie)
Medium	1 <sup>st</sup> DARPA, 2 <sup>nd</sup> WHS
Small	1 <sup>st</sup> US Army (G8/CAA), 2 <sup>nd</sup> Place Air Force (SAF A9)

### Best Website or Electronic Communications:

Large	1 <sup>st</sup> DIA, 2 <sup>nd</sup> US Army
Medium	1 <sup>st</sup> DLA, 2 <sup>nd</sup> DTRA
Small	1 <sup>st</sup> Army (Ft Myer)

### Best Poster/Display:

Large	1 <sup>st</sup> Air Force (SAF AA), 2 <sup>nd</sup> DIA
Medium	1 <sup>st</sup> WHS, 2 <sup>nd</sup> WHS
Small	1 <sup>st</sup> Army (OTSG), 2 <sup>nd</sup> DCAA

### Best Campaign Writing or Publication:

Large	1 <sup>st</sup> DIA, 2 <sup>nd</sup> Air Force (SAF AA)
Medium	1 <sup>st</sup> WHS, 2 <sup>nd</sup> Army (Ft Belvoir)
Small	1 <sup>st</sup> Army (MWR), 2 <sup>nd</sup> Air Force (AF HC)

### Best Photography and Use of Images:

Large	1 <sup>st</sup> DIA, 2 <sup>nd</sup> Air Force (SAF AA)
Medium	1 <sup>st</sup> DODIG, 2 <sup>nd</sup> DARPA
Small	1 <sup>st</sup> Army (OTSG), 2 <sup>nd</sup> Air Force (SAF AAA)

### Best Overall Communications Program:

Large	1 <sup>st</sup> Air Force (SAF AA), 2 <sup>nd</sup> NAVSEA
Medium	1 <sup>st</sup> Army (OTSG) 2 <sup>nd</sup> NAVY/USMC
Small	1 <sup>st</sup> Air Force (SAF AAA), 2 <sup>nd</sup> Air Force (SAF A9)





## Appendix I - Glossary

**Administrative Expenses, PCFO Expenses, Campaign Expenses, or CFC Expenses** - all documented expenses identified in the PCFO application relating to the conduct of a local CFC and approved by the LFCC in accordance with these regulations.

**Administrative Fundraising Rate (AFR)** – The AFR is commonly referred to as the “overhead” rate for a charity. It is published in the CFC charity list for donors to review. There is no ceiling on AFRs. The philanthropic community generally considers an AFR in excess of 35 percent to be potentially problematic, and that donors should carefully review the potential charities to be certain they fully understand the AFR rate before donating to them.

**Agency, Voluntary Agency or Charity** - A non-profit, philanthropic, human health and welfare organization.

**Agency Coordinator** - are generally responsible for overseeing key worker activities and working with the PCFO to conduct the six-week solicitation at his/her agency.

**Average Gift** - Equals the total dollar contributions divided by the number of contributors in the Reporting Unit.

**Campaign Cycle/Period** - A time reference for CFC campaigns that consists of a two-year reporting period which marks the beginning of a campaign and the end of a campaign. Depending on when the PCFO is selected by the LFCC, most campaigns will begin operation on or around March 15 of the first year of the campaign and end around March 14 two years later, depending on the final disbursement for the campaign. For example, March 15, 2004 begins the fall 2004 campaign and March 14, 2006 marks the end of the fall 2004 campaign. More generally, the annual campaign runs for a six-week period between September 1st and December 15th. Actual dates are determined by the LFCC and PCFO and may vary from one campaign to another.

**Catalog of Caring** - The Catalog contains the annual official charity listing for the CFCNCA of approved national, international, local federations; and national and local independent charities. It also has general information about CFC history and management; specific information about payroll deduction, fund raising costs, coercion, distribution of funds; and designation procedures. It also includes personal stories of Federal employees who have been helped by CFC charities. Donors use this document to help select charities to which they want to donate.

**Charity, Charitable Organization or Organization** - a private, non-profit, philanthropic, human health and welfare organization.

**Charity Code** – A unique five digit code assigned by OPM to each charity participating in the CFC. The assignment of charity codes is part of OPM’s centralized national CFC charity list. Donors use this charity code to designate the distribution of their pledge. The Charity Code is also known as Designation Number.

**Charity List** – The official list of charities approved by OPM and the LFCC for inclusion in the CFC within a given geographical solicitation area. The Charity List will consist of three parts: the National / International part, the International part, and the Local part. Organizations that provide services, benefits, assistance, or program activities in 15 or more different states or 1 foreign country can choose to be listed on either the International or National / International part, except for members of a Federation , which must be listed with the Federation. Organizations that provide services, benefits, assistance, or program activities in 15 or more different states but no foreign countries will be listed on the National / International part. All qualifying local organizations within a CFC geographical solicitation area will be listed on the Local part associated with the campaign for that local CFC area. The CFCNCA Charity List in the final form is the Catalog of Caring.

**Combined Federal Campaign or Campaign or CFC** - the charitable fund-raising program established under Executive Order Number 10728, as amended by Executive Order Number 10926, 12353, and 12404.

**CFC Operations (CFCO)** - is the OPM office charged with overall responsibility for day to day management and supervision of the CFC. CFCO provides regulatory oversight, including annual audits, and technical guidance to the CFC campaigns.

**Designated Agency Ethics Officer (DAEO)** - An officer or employee who is designated by the head of a Federal agency to coordinate and manage the agency's ethics program in accordance with the provisions of 5 CFR §2638.201.

**Designated Funds** - contributions which the donor has designated to a specific voluntary agency(ies), federation(s), or general option(s). Also see Undesignated Funds.

**Director** - The Director of the Office of Personnel Management.

**Domestic Area** - means the several United States, the District of Columbia, the Commonwealth of Puerto Rico, and the United States Virgin Islands.

**Double Eagle Award** - Recognizes individuals who contribute two per cent of their salary. The Double Eagle Award is a lapel pin displaying two eagles that symbolize generosity and caring through the CFC.

**Eagle Award** - Recognizes individuals who contribute one per cent of their salary. The Eagle Award is a lapel pin that symbolizes generosity and caring through the CFC.

**Employee** - any person employed by the Government of the United States or any branch, unit, or instrumentality thereof, including persons in the civil service, uniformed service, Foreign Service, and the postal service.

**Federation or Federated Group** - a group of voluntary charitable human health and welfare agencies organized for purposes of supplying common fund-raising, administrative, and management services to its constituent members.

**International General Designation Option** - a donor option indicating that the gift be distributed to all of the international agencies listed in the international section of the campaign brochure in the same proportion as all of the international agencies received designation in the local CFC. This option will have the code IIII.

**Key Worker** - Federal employees who are generally responsible for distributing campaign materials, such as, brochures/listing of charities and Pledge Forms within their agency or unit/division. Key Workers may also collect Pledge Forms and cash/check/money order donations from contributors, and transmit these items back to either the agency coordinator, a loaned executive (LE) or the PCFO. The process varies in each campaign and/or agency.

**Loaned Executive (LE)** - Federal employees "loaned" by a Federal agency to either the LFCC or PCFO to assist in the conduct of the campaign. LE responsibilities vary in each campaign. The primary responsibility of LEs is to assist their assigned Federal agency in conducting the campaign. Responsibilities may also include pre-screening charity applications and other functions in support of the overall local campaign.

**Local Federal Coordinating Committee (LFCC)** - The Local Federal Coordinating Committee (LFCC) is comprised of Federal employees and representatives of labor unions with Federal employees as members that are officially designated by the Director to conduct the CFC in a particular community. The LFCC selects the principal combined Fund Organization (PCFO that serves as fiscal agency for the campaign. The LFCC provides oversight for the local campaign in conformance with the CFC regulations and the policies established by OPM. The LFCC also approves local (and in some instances, statewide) charities in their campaign area that have met CFC eligibility standards as set forth in the CFC regulations. Federal employees interested in volunteering with the CFC should contact their local LFCC or ask your duty-station Agency CFC Coordinator for more information.

**Office of Personnel Management (OPM)** - OPM has responsibility for the oversight of the CFC. The Director of OPM has designated to the CFCO responsibility for day to day management of the CFC. CFCO reviews and provides guidance and technical advice on regulations, and has the authority to conduct compliance audits on any CFC local campaign's fiscal records.

**Overseas Campaign** - the DoD Combined Federal Campaign-Overseas (CFC-O) includes all areas other than those included in the domestic area.

**Principal Combined Fund Organization (PCFO)** - the PCFO administers the local campaign and acts as fiscal agent under the direction and control of the LFCC and the Director. OPM sets strict requirements for this role. Annual audits are required of the PCFO by an independent CPA.

**Solicitation** - any action requesting money, either by cash, check or payroll deduction, on behalf of charitable organizations.

**Undesignated Funds** - contributions that the donor has not designated to a specific voluntary agency(ies), federation(s), or general option(s).



